

CN!*Express*[®]

CX-6000[®]
~Single User~
Version 3.38

Federally-Approved AES Encryption

Auric Systems International

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Chapter 1.

Welcome to

CN!*Express*

Single User

Thank you for selecting CN!*Express* Single User (SU) CX-6000 to process your credit card, purchase card, and check transactions. CN!*Express* connects you directly with your credit card, purchase card, and check processing service. CN!*Express* offers the following features:

- Secure storage of credit card and checking account numbers, using Federally-approved AES encryption
- Commands, fill-in-the-blank forms, menus, and buttons that make it easy for any user to record and send transactions
- On-screen information about each transaction that you can customize for your individual needs
- Prompts, messages, and reports that tell you the exact status of each transaction
- Standard reports and filters available with one click of the mouse

CN!*Express* works with many different operating systems, processing services, and currencies. No matter what processing service you use, and no matter where your business takes you, CN!*Express* is ready.

This chapter contains information on using the manual and contacting Auric Systems International.

Using This Manual

The step-by-step instructions in this manual explain how to operate CN!Express using your keyboard for most tasks.

The names of keys on your keyboard are printed in bold as follows: **Enter**. Here are some examples:

<i>If You See . . .</i>	<i>Do This . . .</i>
Press Enter .	Press the Enter key.
Press Alt T .	Press the Alt key and the letter T key at the same time.
Press Ctrl P .	Press the Ctrl key and the letter P key at the same time.
Press F2 .	Press the F2 function key.
Press Y .	Press the letter Y key by itself.

The titles of screens and any information that appears on the screens (for example, the names of boxes or tabs) are printed as follows: Active Transactions.

If you prefer to use only your mouse and the on-screen buttons to record, send, and report on transactions, see “Chapter 14. Using the On-Screen Buttons” on page 161.

Printing This Manual and the Quick Reference Card

You can view and print this manual from the Help menu. Press **F1**.

The “Quick Reference Card” is also available from the Help menu (press **Alt H**, then **Q**), for easy reference while you work. The Quick Reference Card runs through the basic steps for starting up, shutting down, recording and saving a transaction, sending a transaction, editing and deleting a transaction, filtering, and printing.

To view and print the manual and Quick Reference Card, you need Adobe Acrobat Reader. You can download Acrobat Reader for free:

1. Press **Alt H** (Help menu).
2. Press **G** (Get Acrobat Reader).
3. Follow the instructions at the Adobe Acrobat website.

Bound, hard copies of this manual are also available from Auric Systems International. Contact support (support@AuricSystems.com) to purchase your copies.

Contacting Auric Systems International

To contact Auric Systems International:

Phone:	603-924-6079
E-mail:	support@AuricSystems.com (technical support) sales@AuricSystems.com (sales)
Web Site:	www.AuricSystems.com

When you call, please have your serial number handy. When you purchased CN!Express over the Internet, the serial number and activation key were faxed or e-mailed to you.

After you install the live CN!Express, you can find your serial number and activation key under the Help menu:

1. Press **Alt H** (Help menu).
2. Press **A** (About).
3. Scroll down to find Serial Number and then Activation Key.
4. Write down the numbers.
5. Press **Enter** to leave the Help menu.

Chapter 2. Installing and Setting Up **CN!*Express***

This chapter describes the minimum and recommended system requirements for CN!*Express* Single User; how to install the software on your computer system; and how to set up CN!*Express*.

Minimum and Recommended System Requirements

Minimum System Requirements

CN!Express requires:

- A minimum of 128 Mbytes of memory
- An active TCP/IP connection and fixed IP address for submitting transactions to your processing service.

CN!Express runs on any of the following platforms:

- NT 4.0
- NT 2000
- XP

For initial installation, you'll need approximately 40 Mbytes of hard disk space.

You should install Internet Explorer 5.5 (or better) with 128-bit encryption.

Recommended System Requirements

For the best performance, use Windows NT 4.0, NT 2000, or XP, with a minimum of 128 Mbytes of memory.

You should keep a minimum of 100 Mbytes of free disk space to ensure a long-lived and trouble-free installation.

Additional information about system requirements is available at www.AuricSystems.com.

Important Information

Your processing service has its own minimum operating requirements. See "Appendix C. Processing Service Information" on page 193 for information on your specific processing service.

CN!Express Single User is designed to be installed and run from the desktop. It should not be run from a shared server. If you're working in a shared environment, use *CN!Express* Multi-User.

Installing CN!Express

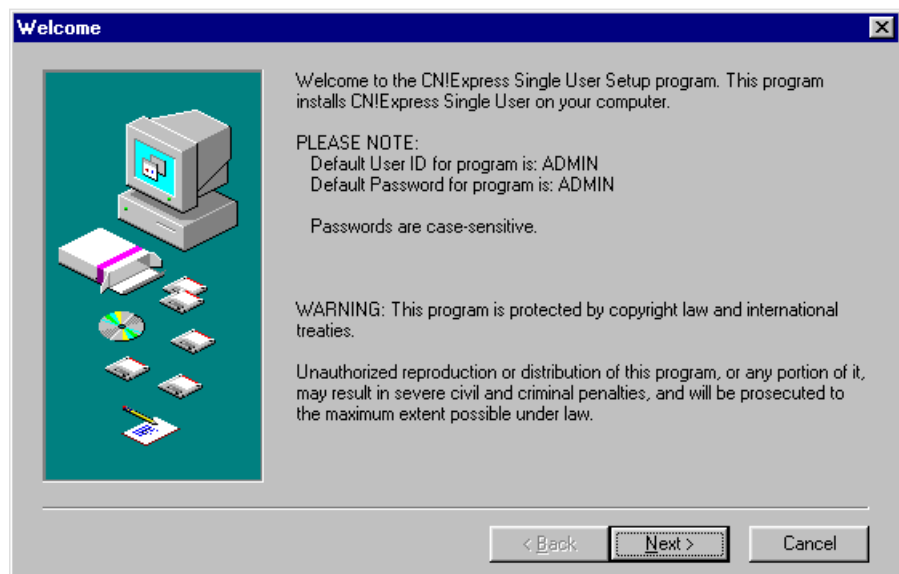
CN!Express always automatically installs in the demonstration (not the live) version. After you configure CN!Express the way you want and practice using it, you switch manually to the live version.


- With the demonstration version of CN!Express, transactions never go anywhere; the demonstration version merely acts as if they did.
- With the live CN!Express, transactions are really sent to and processed by your processing service. (The live CN!Express also offers a DEMO mode. This is not the same as the demonstration version, although it acts the same. DEMO mode can be switched on and off for individual users.)


You can install the demonstration version even if you haven't purchased and registered the live CN!Express. The demonstration version lets you try out the application and procedures without worrying about mistakes. However, you can't run the demonstration version on the same computer as the live version.

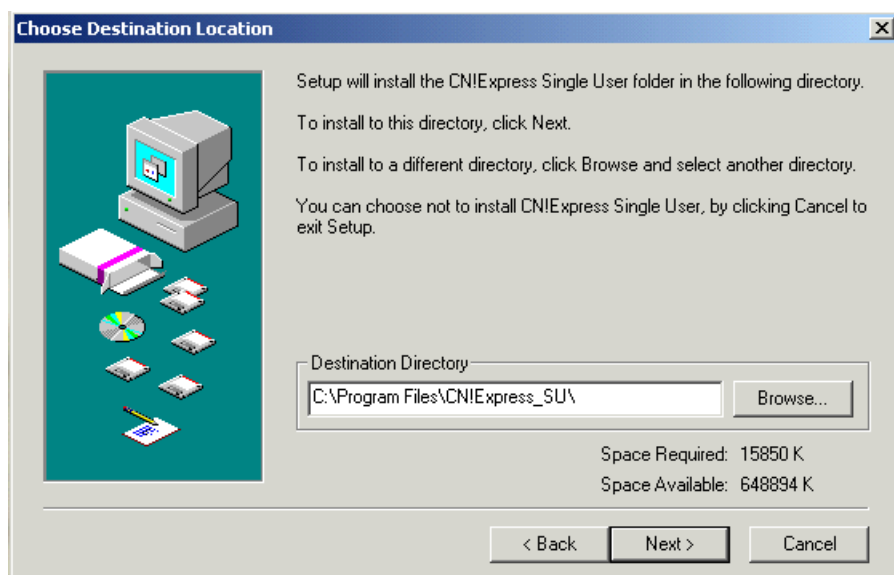
1. Begin the installation from the Auric Systems International web page (www.AuricSystems.com). Go to Downloads and follow the instructions for downloading CN!Express Single User CX-6000.

The following screen appears:

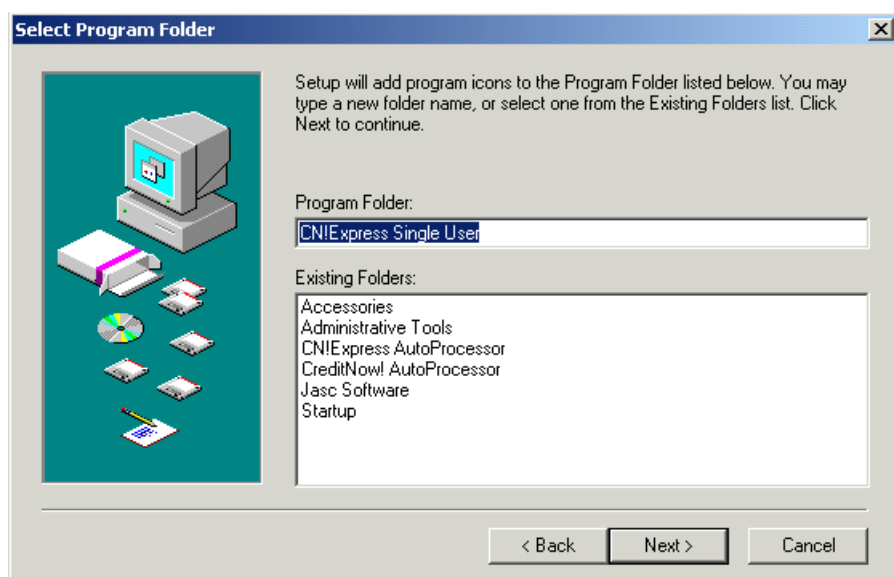


2. Click on 

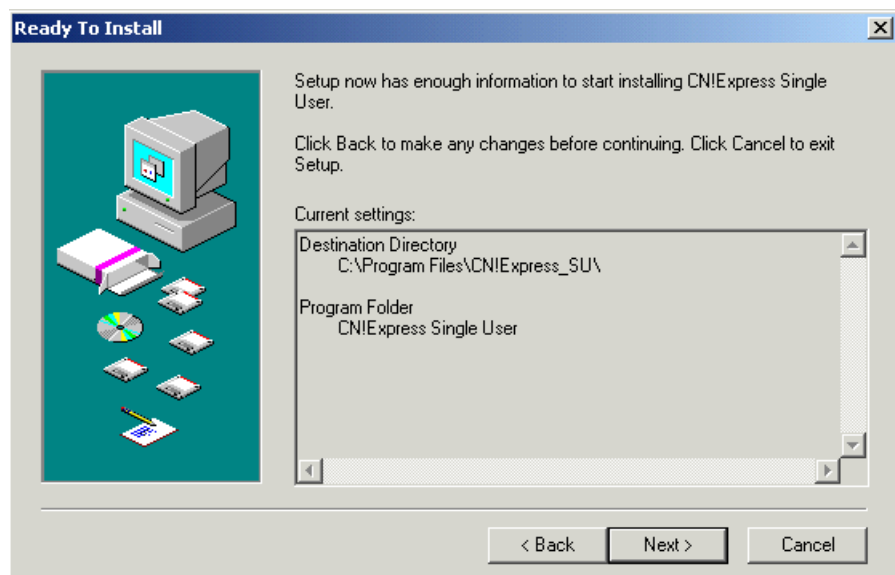
3. Read the license screen. Print it if you like. Click on  to accept the license and to view:




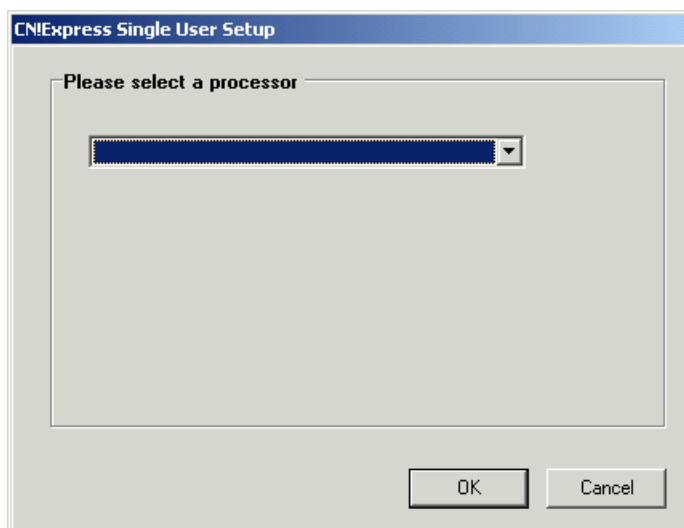
4. Click on  to view:




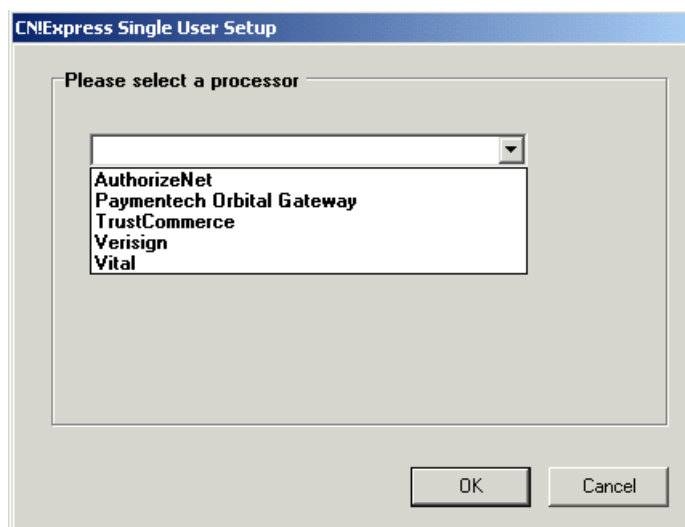
5. Click on  to view:



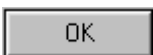
6. Click on  to view:

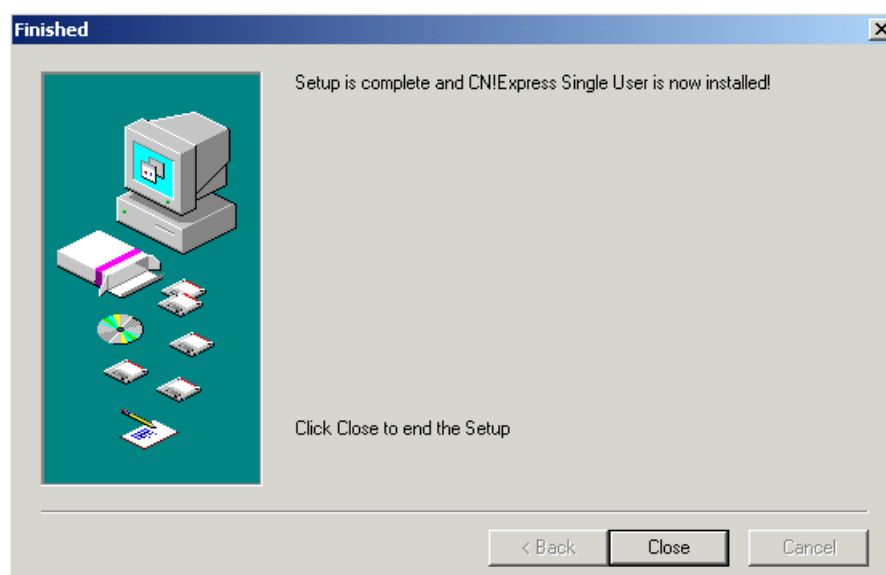


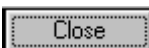
7. Click on  to view a screen like the following:



Click on the processing service you want to use.

8. Click on  to view:



9. Click on 

An icon appears on your desktop:




After installing the demonstration version of CN!Express, you may want to:

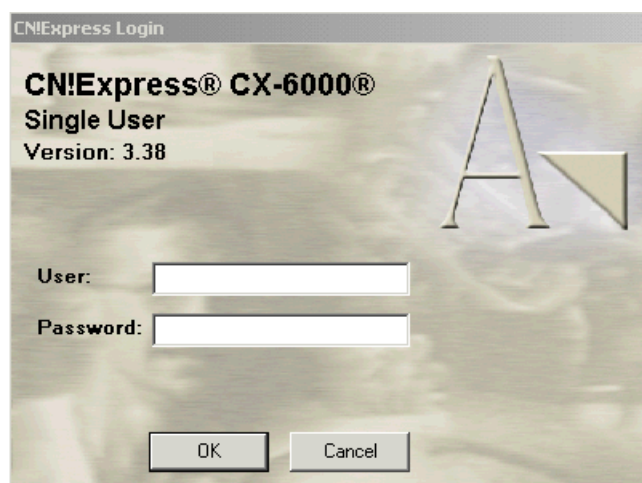
Auric Systems
International strongly
recommends that you
practice using the
features of CN!Express in
the demonstration version
before you switch to live.

<i>Do This . . .</i>	<i>For Instructions, See . . .</i>
START UP	page 12
CHANGE THE ADMIN PASSWORD (RECOMMENDED)	page 14
SWITCH TO THE LIVE CN!EXPRESS	page 31

Starting Up the First Time

When you “double click,” you click the mouse button quickly two times.

1. On your computer desktop, double click on  to view:



You must type both the User name and Password. The User name is ADMIN. The Password is ADMIN.

As soon as CN!Express starts up, change the password **immediately**, as explained on page 14.

2. In the User box, type **ADMIN** (in all capital letters).
3. Press the **Tab** key on your keyboard.
4. In the Password box, type **ADMIN** (in all capital letters.)
The screen hides your password and shows *****.
5. Press **Enter** to view a screen like the following:

The same word appears when CN!Express is live and in the DEMO mode.

The word DEMO appears in the upper right corner. As long as DEMO is on the screen, you can't really send transactions to your processing service.

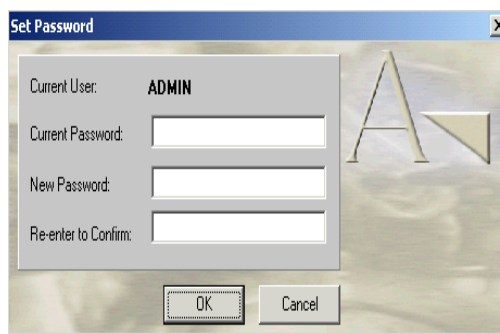
Changing the Default Password for ADMIN

You should change the default password for the ADMIN user immediately. The ADMIN user has special privileges. For example, the ADMIN user can decide which users are allowed to give refunds and how much money they're allowed to handle. You don't want everyone to be able to make those decisions.

Only the ADMIN user can change the ADMIN password.

To change the default password for ADMIN:

1. Press **Alt C** (Configure menu).
2. Press **S** (Set Password) to view:



3. Type the default password ADMIN in the Current Password box.
4. Press the **Tab** key on your keyboard.
5. Type a new password in the New Password box. (The password appears as a series of asterisks: *****)
6. Press the **Tab** key on your keyboard.
7. Type your new password again in the Re-enter to Confirm box. (The password appears as a series of asterisks: *****)
8. Press **Enter**.

From now on, when you log in as ADMIN, you must use the new password.

You can't add or delete users, archive or change your processor setup unless you log into CN!Express as an ADMIN user; and you can't log in without your password.

Your new password must be at least four characters long.

CN!Express is case-sensitive. For example, ADMIN, Admin and admin are three different passwords.



Do not forget your new ADMIN user password.

Setting Up Other Users

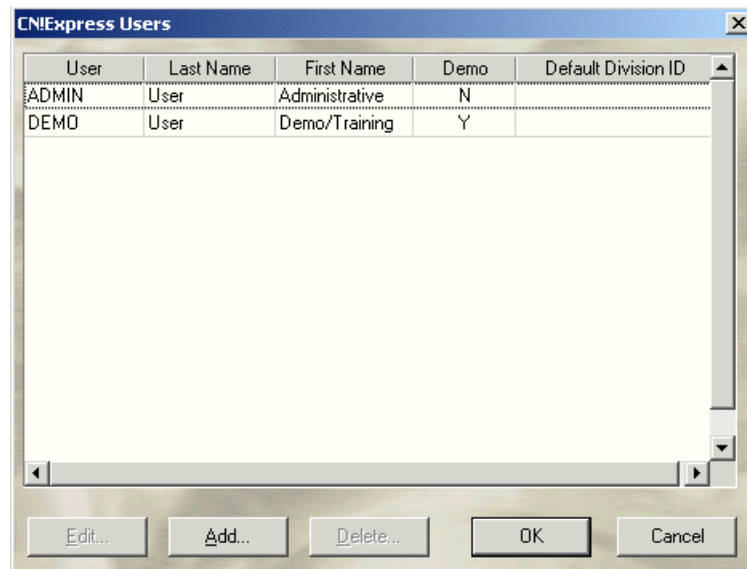
You must be an ADMIN user to add or delete other users or change their user information.

You can add and delete users, change their user privileges (the types of information they can see or change on CN!Express), decide whether they can issue refunds, and limit the amount of money they can handle during a single transaction.

Adding a User

To add a user to the system:

1. Make sure you are logged into the system as an ADMIN user.
2. Press **Alt C** (Configure menu).
3. Press **U** (Users) to view:



CN!Express comes with two user accounts: ADMIN (for the ADMIN user) and DEMO (so that anyone can use CN!Express in DEMO mode).

4. Press **A** (Add) to view:

A unique name for the user account (any combination of 4 to 20 characters).

A check-mark in this box means the specific user always works in DEMO mode; since transactions aren't really saved or sent to a processing service, this mode is most useful for training.

The last and first names of the user.

A unique password (at least four characters); you'll see **** in the boxes.

A check-mark in this box means the user must enter his or her password to start CN!Express; if you remove the check-mark, the user can change the password to no characters (blank) and still log in. Auric Systems International recommends that you *keep a check-mark here*.

You can't give two users the same user name or the same password.

5. Fill out the boxes.

Auric Systems International recommends keeping the check-mark at Require Password for this User.

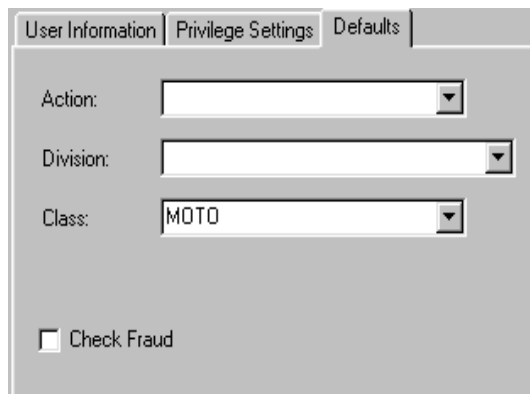
6. Click on the Privilege Settings tab to view:

A check-mark in this box means the user can make refunds; if this box is left blank, the user can't make refunds.

A check-mark in this box means the user can export transactions; if this box is left blank, the user can't export.

Type the maximum amount that the user is allowed to handle during any transaction (including sales and refunds); if this box is left blank, the user can handle any amount (there isn't any maximum).

- Click on the Defaults tab to view a screen like the following:



The information you should enter on this screen depends on the requirements of your processing service. This screen shows the defaults that appear on the Main data entry form every time this particular user starts a new transaction.

- Under Action, a default action appears automatically. You can leave this as is or select another action.
- If you leave Division blank, the default division (also known as Merchant ID) is the first one you've established under processor setup. Other divisions may be available.
- The default class (way in which the transaction was received) is by MOTO (mail order or telephone). The other choices are recurring or E-commerce (over the Internet).
- The default is no check-mark; your processing service won't automatically check transactions for fraud. If you click on the box to add a check-mark, your processing service should automatically check all transactions for fraud.

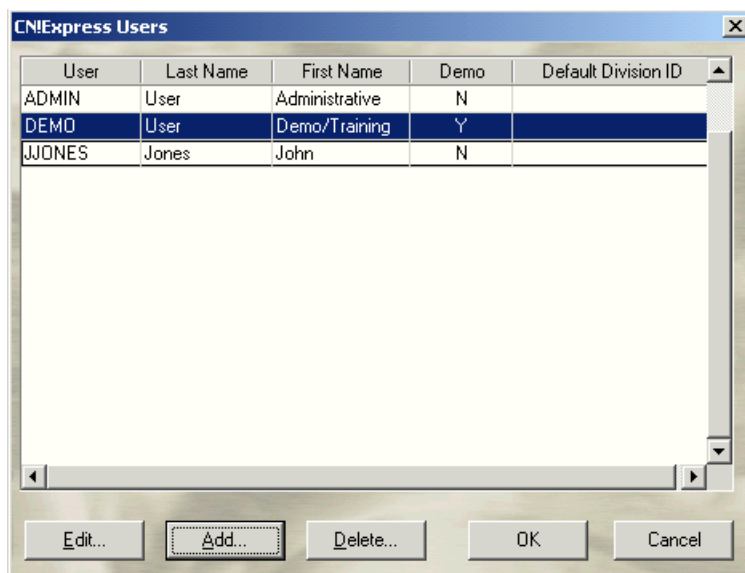
Each processing service handles fraud checking in its own way. Ask your processing service for an explanation of their requirements and options.

- When you've finished filling out the forms, press **Enter** to add the user to the list.
- Press **Enter** to save your changes and exit the Configure Users screen.

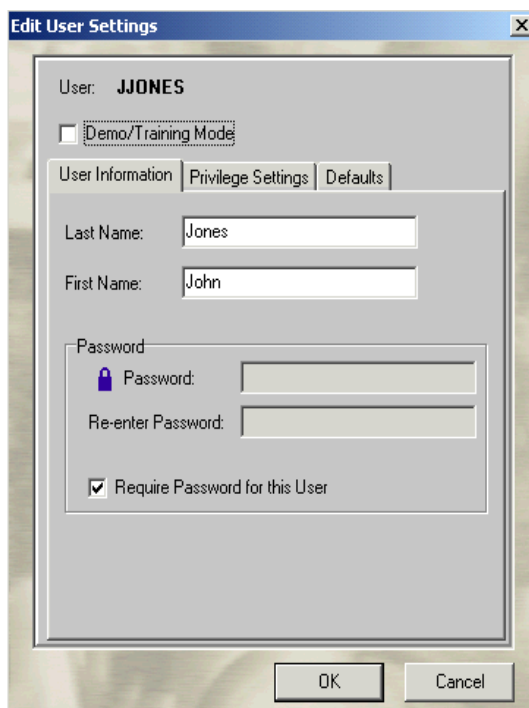
Changing User Information


If you aren't the ADMIN user but want to change your own password, see "Changing Your Password" on page 40.

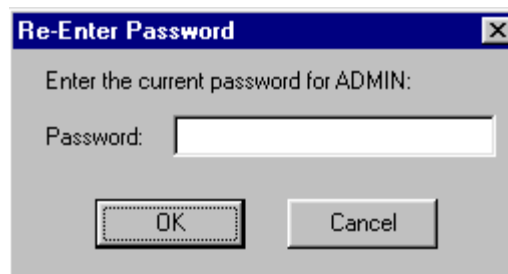
1. Type **Alt C** (Configure menu).
2. Press **U** (Users) to view:



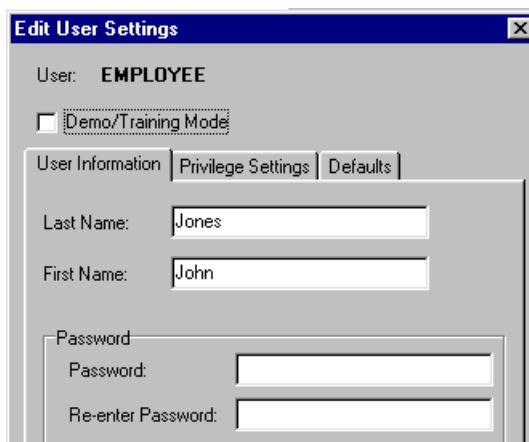
3. Click on the user's name (in this example, JJONES).
4. Press **E** (Edit) to view:



5. Change any information you want to change.
6. To change the password, click on  to view:



7. Type the current ADMIN password in the Password box. (The password appears as a series of asterisks: *****)
8. Press **ENTER** to view:



The screenshot shows a window titled "Edit User Settings". At the top, it says "User: EMPLOYEE". Below that is a checkbox labeled "Demo/Training Mode" which is unchecked. There are three tabs: "User Information", "Privilege Settings", and "Defaults". The "User Information" tab is active, showing "Last Name: Jones" and "First Name: John". Below the tabs is a section labeled "Password" containing two text boxes: "Password:" and "Re-enter Password:", both of which are empty.

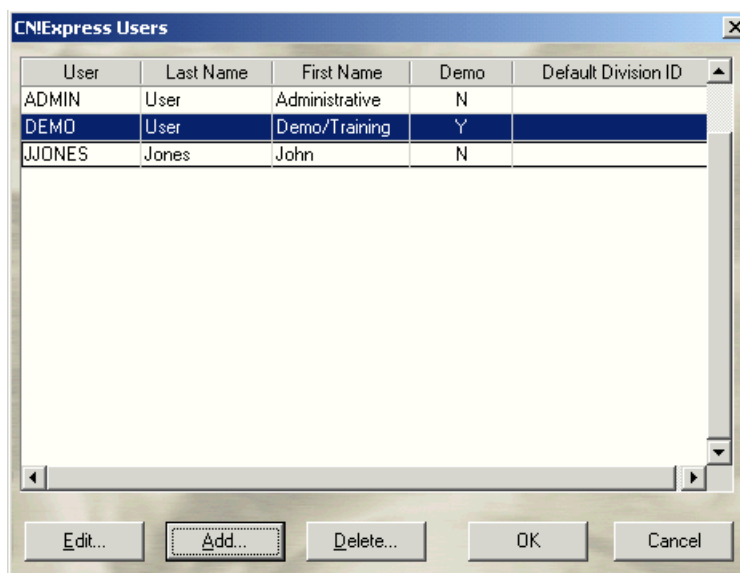
The new password must be at least four characters long.

CN!Express is case-sensitive. For example, ADMIN, Admin and admin are three different passwords.

9. Type the new password into the unlocked Password box. (The password appears as a series of asterisks: *****.)
10. Type the password again in the Re-enter Password box. (The password appears as a series of asterisks: *****.)
11. Press **Enter** to enter the changes you've made.
12. Press **Enter** to save your changes and exit the Configure Users screen.

Deleting a User

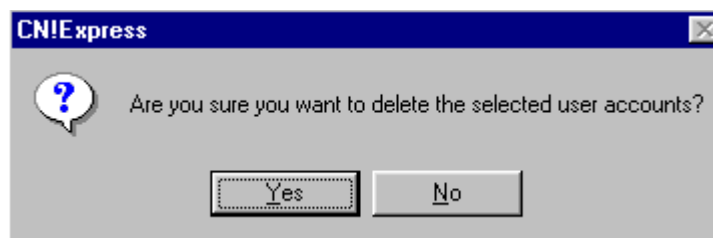
1. Type **Alt C** (Configure menu).
2. Press **U** (Users) to view:



You can't delete the ADMIN user. You can delete the DEMO user.

3. Click on the user's name (in this case JJONES).
4. Press **D** (Delete) to remove the user from the user list.

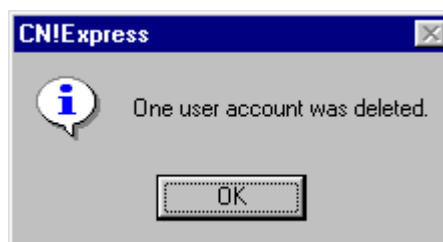
CN!Express displays the following message:



When you delete a user, you *don't* delete any transactions that the user entered or processed.

5. Press **Y** (Yes).

CN!Express displays a message like the following:



6. Press **Enter**.
7. Press **Enter** again, to save your changes and exit the Configure Users screen.

Uninstalling and Reinstalling CN!Express

To uninstall CN!Express (either the live working CN!Express or the demonstration version):

1. Exit CN!Express.
2. Click on the Start button on your desktop.
3. Click on Programs.
4. Click on CN!Express Single User.
5. Click on Remove CN!Express Single User.

6. Click on 

CN!Express is removed from your computer.

7. You must manually remove the CN!Express directory from your system. You can find it using Windows Explorer. The default name of the directory is CN!Express_SU and its default location is under Program Files.

Decide whether you want to save the current data base of transactions.

- If you do, first back up your data base, as explained in “Backup and Restore” on page 173. Then delete the entire directory.
- If you don’t, delete the entire directory.

To reinstall CN!Express, use the installation procedure described earlier in this chapter.


Chapter 3. Starting Up, Shutting Down, First Transaction

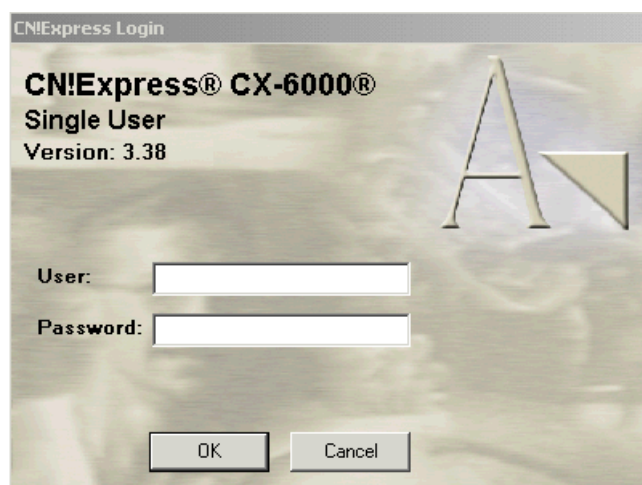
This chapter explains how to start up and shut down *CN!Express*.

This chapter also describes how to create your first DEMO transaction in *CN!Express*. This chapter doesn't explain everything you can view or do on the *CN!Express* screen. For more information, you'll want to read "Chapter 5. Using the *CN!Express* Screen" on page 41 and "Chapter 6. Recording New Transactions" on page 59.

Starting Up CN!Express

To start up CN!Express:

1. On your desktop, double click  to view:



If someone else was using CN!Express before you, their user name appears in the User box. You must type your own user name.

CN!Express is case-sensitive. For example, ADMIN, Admin and admin are three different passwords.

2. Type your User name if it isn't already shown.
3. Press the **Tab** key on your keyboard.
4. Type your Password. (The password appears as a series of asterisks: *****.)
5. Press **Enter**.

CN!Express opens on the main CN!Express screen.

Shutting Down CN!Express

To shut down CN!Express, do one of the following:

- Either press **Alt F** (File menu), then **T** (Exit).
- Or press **Alt F4**.

When you shut down, CN!Express saves all the transactions you entered or changed, and all the user preferences, table layouts, sorts and configurations that you set up.

Before You Try Your First Transaction

You are about to learn how to send a transaction. You don't want this first transaction to be really saved or really submitted to your processing service. Therefore, make sure you are working in either the demonstration version of CN!*Express* or in the DEMO mode of the live version. (For more information about the DEMO mode, see "Chapter 4. Going Live and Changing Your Password" on page 31.)

Make sure that the word DEMO appears in the upper right corner of the CN!*Express* screen. If DEMO doesn't appear, *do not try the sample transaction.*

As long as DEMO appears on the upper right corner of the CN!*Express* screen, you can practice any procedure in this manual without affecting real credit cards, purchase cards, or checks, and without sending real transactions to the processing service.

Creating and Sending Your First Transaction

For this example, *you must be in the DEMO mode or in the demonstration version of CN!Express*. The word DEMO must appear in the upper right hand corner of your screen.

Creating Your First (DEMO) Transaction

Instead of pressing **Enter** in Step 3, you can click on




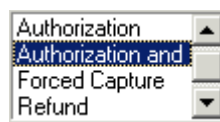
Don't type a dollar sign in Amount. CN!Express automatically adds a \$ to U.S. currency.

1. Press **Ctrl 2** to view the Active Transactions table.
2. Press **F2** (Main menu).
3. Press **Enter** to start a new transaction.
4. Type information into the boxes that are **bold**:

<i>In This Box . . .</i>	<i>Type . . .</i>	<i>Press the Tab key . . .</i>
Account (credit card account number)	5151301400246102	Tab to the Exp box
Exp (expiration date of card)	0204	Tab to the Amount box
Amount (amount of transaction)	50	Tab to the Action box

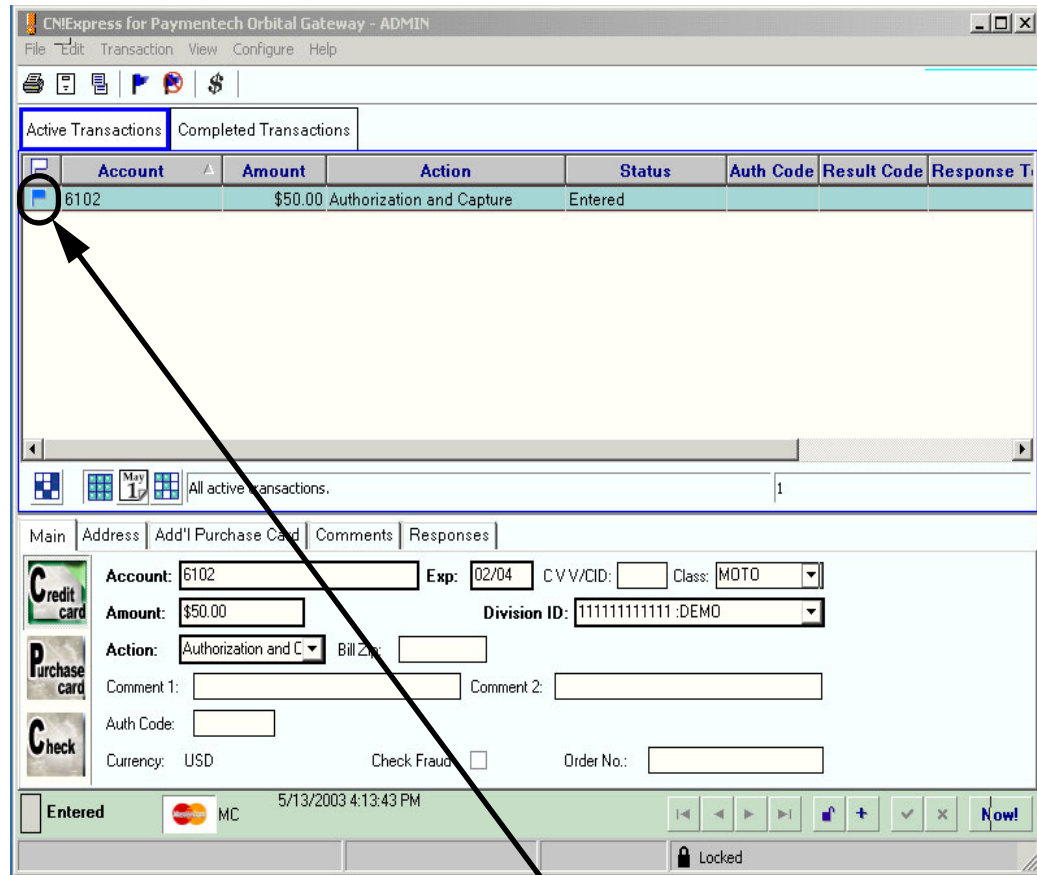
5. The “action” describes the type of transaction (sale, refund/credit or void, for example).

In the Action box, click on  to view a list like the following:



6. Click on Sale or on Authorization and Capture.
7. If any other boxes are **bold**, you must **Tab** to them and fill them in. (Your screen is set up for your specific processing service. Each processing service requires different information.) Otherwise, go to Step 8.
8. Press **Enter**.

You've just saved your first transaction. Your screen should look like this:



After you enter the transaction, a flag appears automatically. This flag shows that your transaction is ready to send to your processing service.

Also, after you enter the transaction, your screen shows a truncated (shortened) account number. Full account numbers appear on the screen only while you're entering or editing a transaction. (The account number is the credit card, purchase card, or bank account number for the transaction.)

For information on all fields, press **ALT H** (Help), then **F** (Field Reference).

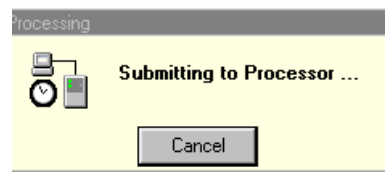
The bottom half of your screen (the Main data entry form) may look different; it shows the exact boxes (fields) that your processing service expects. For example, if your processing service doesn't expect Division ID information, that box won't appear on your screen.

Sending Your First (DEMO) Transaction

To send your first transaction to your processing service:

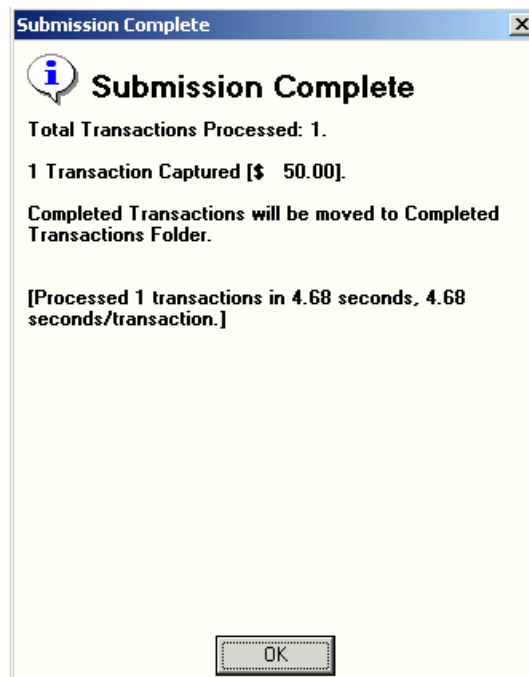
1. Press **Alt T** (Transaction menu).
2. Press **F** (Submit Flagged)

The following message appears:



3. Wait. CN!Express DEMO mode simulates (goes through the motions of) sending the transaction to the processing service.


When "processing" is complete, this message appears:



4. Press **Enter**.

You've just submitted your first transaction (not really, though; in the demonstration version or DEMO mode, nothing goes to the processing service).

CN!Express automatically moves the transaction off the Active Transactions table:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Response T

5. Press **Ctrl 3** (Completed Transactions) to view:

Active Transactions		Completed Transactions			
Account	Amount	Action	Status	Auth Code	Result ...
6102	\$50.00	Sale	Deposited	DEM079	00

Congratulations! You've completed your first transaction.

Creating a (Demo) Failed Transaction

The previous example resulted in a successful transaction. If you want to see what happens when a transaction fails, repeat the procedure but enter an Amount with an odd number of cents (for example, type in **50.99**). The demonstration version and DEMO mode of CN!Express are set up so that the “processing service” declines any transaction where the amount includes an odd number of cents.

Chapter 4.

Going Live and

Changing Your

Password

This chapter explains how to switch to the live version of *CN!Express*, how to turn DEMO mode on and off, and how to try out a live transaction, actually sending it to your processing service. It also describes how to change your own password, even if you aren't an ADMIN user.

Switching to the Live Version

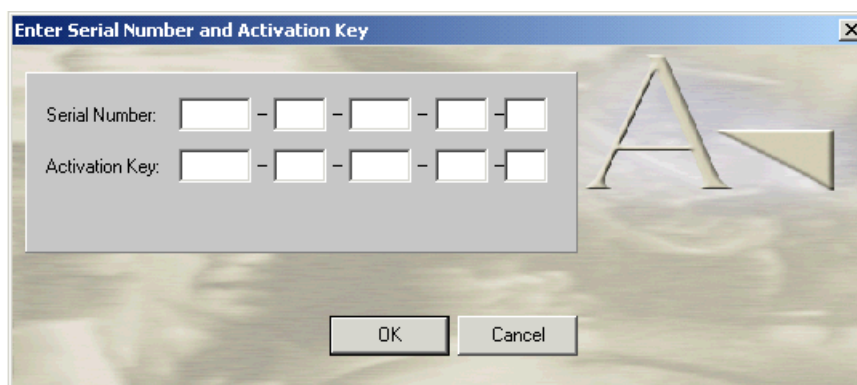
The live CN!Express requires an **active TCP/IP** connection to process transactions. (That is, the TCP/IP connection must be active if you want to submit transactions to the processing service.)

After installing CN!Express, you may switch from the demonstration version to the live version at any time. Auric Systems International strongly recommends:

- Practicing with and configuring CN!Express in the demonstration version
- Placing the live version in DEMO mode when new users need to gain experience with the features of CN!Express (see page 35)

To switch from the demonstration version to live:

1. Type **Alt C** (Configure menu).
2. Press **K** (Serial Number and Activation Key) to view:



3. Type in your serial number and activation key. When you purchased CN!Express over the Internet, the serial number and activation key were faxed or e-mailed to you.
4. Press **Enter**.

When you go live, all the transactions you entered and submitted in the demonstration version disappear from the Active Transactions and Completed Transactions screens.

Setting Up Your Processing Service

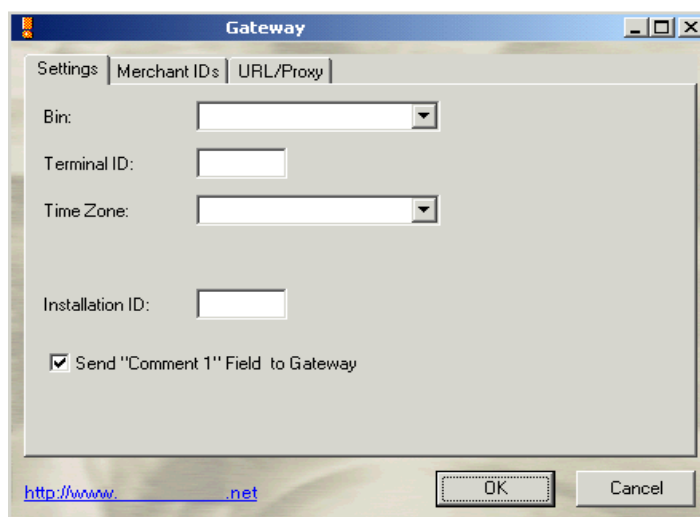
You must set up the live CN!Express to handle your specific processing service. CN!Express is designed to work with many different processing services. Check with your processing service for its special setup requirements; also see “Appendix C. Processing Service Information” on page 193.

To set up your processing service:

1. Make sure you’re logged into the system as an ADMIN user.
2. Press **Alt C** (Configure menu)
3. Press **O** (Processor Setup) to view a screen like the following:

You can’t view this screen or make changes unless you’re an ADMIN user.

When you install CN!Express in the demonstration version, this screen is already filled out for you. When you switch to the live CN!Express or change processing services, you must fill in information from your processing service.



The screen, tabs, and boxes that you see are set up for your specific processing service and may look quite different from the ones shown above.

4. Fill in the boxes as needed. (Contact your processing service for their requirements, and refer to “Appendix C. Processing Service Information” on page 193.)
5. If the Send “Comment 1” Field to Gateway appears and if you don’t want to automatically send Comment 1 to your processing service, click on the box to remove the check-mark. Chapter 5 provides more information about comment fields.

6. Press **Enter** to save the changes.

Switching the Live Version into DEMO Mode

Only the ADMIN user can turn DEMO mode on and off.

The following sections describe how to turn on, start up, and turn off the DEMO mode of the live *CN!Express*.

You can't switch from the live *CN!Express* back to the demonstration version (once you're live, you're always live unless you uninstall and reinstall). But you can switch from the live *CN!Express* from the LIVE mode to the DEMO mode.

In DEMO mode, practice transactions aren't really sent to the processing service; the actions taken in DEMO mode never affect real credit cards, purchase cards, or checks; and they never affect information in the live *CN!Express*.

Turning on DEMO Mode

When *CN!Express* is in DEMO mode, the word DEMO appears in the upper right hand corner.

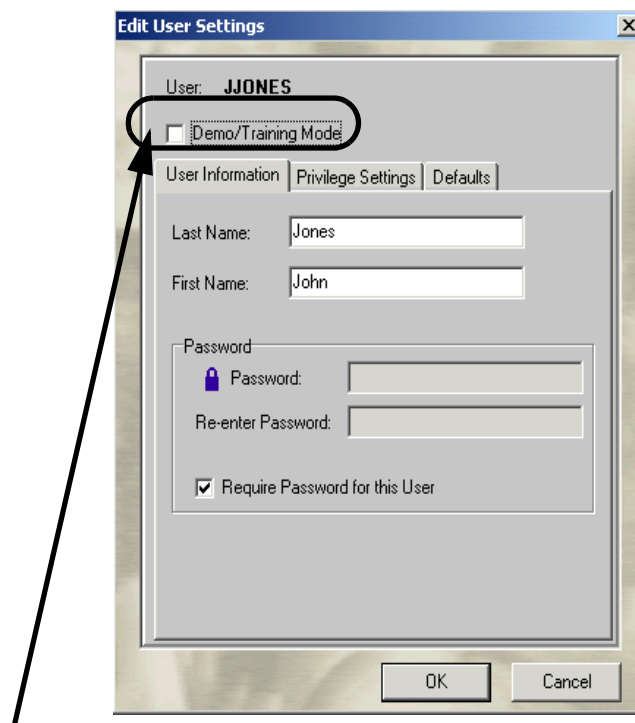
You can turn on DEMO mode in two ways:

- Either log on to *CN!Express* using DEMO as the user name and as the password
- Or change the user settings for a specific user; whenever that user logs on, *CN!Express* automatically starts in DEMO mode

Once DEMO mode begins, any live transactions on the Active Transactions and Completed Transaction tables temporarily disappear. They reappear as soon as the DEMO user exits *and* a LIVE user logs on (someone who's permitted to work with the live *CN!Express*).

To change the user settings for a specific user:

1. You must log in as the ADMIN user.
2. Press **Alt C** (Configure menu).
3. Press **U** (Users).
4. Double click on the user's name to view a screen like the following:



The change affects only this one user; all other users may work in the live CN!Express.

5. Click on the box next to Demo/Training Mode to add a check-mark.
 6. Press **Enter**.
 7. Press **Enter**.
 8. Press **Alt F4** to exit CN!Express.
 9. The user then logs in with his or her own user name and password.
- As soon as the user logs in, DEMO mode begins.

Turning off DEMO Mode

Only the ADMIN user can turn off DEMO mode.

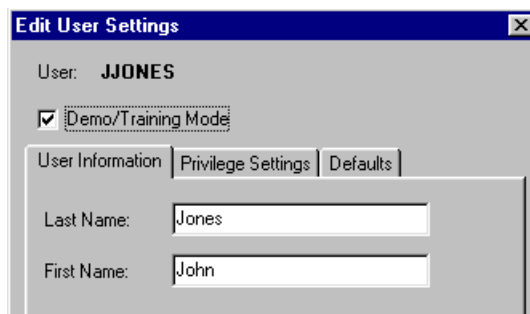
If the user is ready to work in the live CN!Express, DEMO mode must be turned off.

To turn off DEMO mode:

- Either exit CN!Express and log on as a user who's permitted to work in LIVE mode
- Or change the user settings for the specific DEMO user so that user can work in LIVE mode

To edit the user settings:

1. Log into CN!Express as the ADMIN user.
2. Press **Alt C** (Configure menu).
3. Press **U** (Users).
4. Click on the user's name to view a screen like the following:



The change affects only this one user; you have to change user settings one-by-one.

5. Click on the box next to Demo/Training Mode to remove the checkmark.
6. Press **Enter**.
7. Press **Enter**.
8. Press **ALT F4** to exit CN!Express.
9. The user then logs in with his or her own user name and password.

When CN!Express is live, the word DEMO does *not* appear in the upper right hand corner.

When the user logs into CN!Express in the usual way, CN!Express is live for that user (not in DEMO mode). Any transactions the user created, saved, or submitted in DEMO mode no longer appear on the

Active Transactions or Completed Transactions tables. (They reappear as soon as the user returns to DEMO mode.)

In LIVE mode, transactions are really saved and really sent to the processing service.

Using the Live CN!Express

Do *not* select Sale in the **Action** box. Otherwise, when you press **Alt T**, then **F**, the processing service will *really* charge \$1 to the credit card holder.

When you've finished working in the demonstration version or in DEMO mode, you may want to try out the live CN!Express without completing a real transaction.

Since you have to use a real credit card number, make sure that you:

- Type **1** (one dollar) in the Amount box
- Type **A** (Authorize) in the Action box

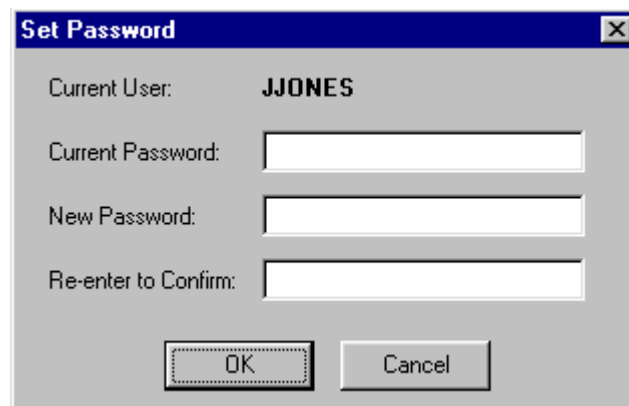
When the processing service finishes authorizing this transaction, it appears on the Active Transactions table (either as a successful authorization or as a delayed capture). You should immediately delete this \$1 transaction:

1. Make sure you're in the live version of CN!Express and *not* in DEMO mode (the word DEMO does not appear on the upper right hand corner of the screen).
2. Click on the transaction.
3. Press **Alt T** (Transaction menu).
4. Press **D** (Delete).
5. Press **Y** (Yes).

Changing Your Password

To change your own password:

1. Make sure you're logged into the system under your own User name and password.
2. Type **Alt C** (Configure menu).
3. Type **S** (Set Password) to view:

A screenshot of a 'Set Password' dialog box. The title bar is blue with the text 'Set Password' and a close button. The dialog has a light gray background. It contains four labels with corresponding input fields: 'Current User:' with the text 'JJONES', 'Current Password:' with an empty text box, 'New Password:' with an empty text box, and 'Re-enter to Confirm:' with an empty text box. At the bottom, there are two buttons: 'OK' and 'Cancel'.

If you don't remember your current password, you can't change it. You must ask someone with ADMIN privileges to help you.

Your password must be between 4 and 20 characters long.

CN!Express is case-sensitive. For example, JONES, Jones and jones are three different passwords.

4. Type your current password in the Current Password box.
5. Press the **Tab** key on your keyboard.
6. Type a new password in the New Password box (you'll see *****).
7. Press the **Tab** key on your keyboard.
8. Type your new password again in the Re-enter to Confirm box (you'll see *****).
9. Press **Enter** to save your new password. From now on, you must use your new password when you start up CN!Express.

Chapter 5.

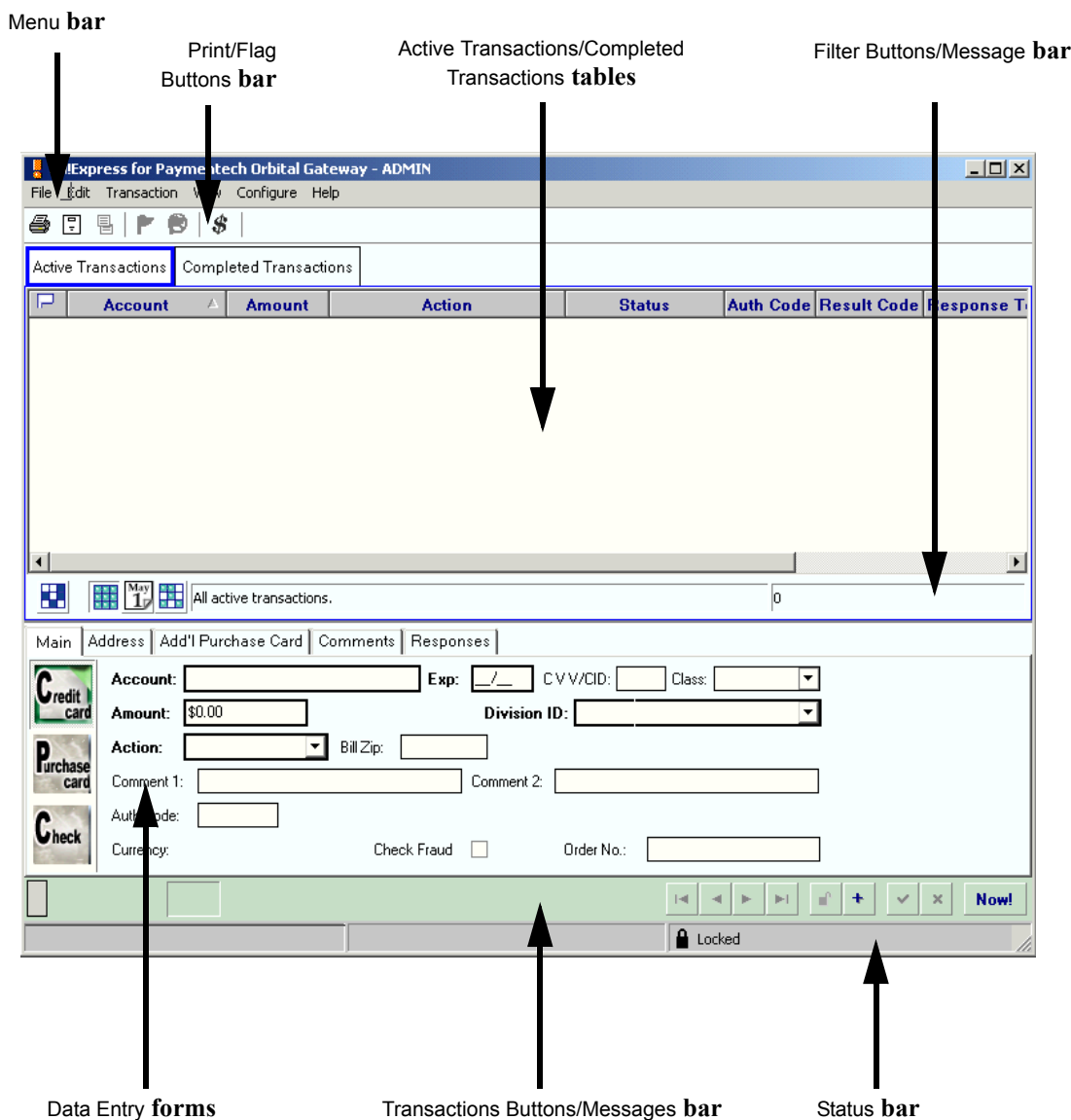
Understanding the CN!*Express* Screen

On the main CN!*Express* screen you can quickly switch between displays of work in progress (Active Transactions) and completed work (Completed Transactions). You can also quickly switch between the data entry forms for credit cards, purchase cards, and checks. You will work primarily on this main CN!*Express* screen, with commands, pull-down menus, messages, and on-screen buttons.

This chapter explains the CN!*Express* screen, the data entry forms, and the on-screen buttons.

Most of the tasks you want to perform in CN!*Express* can be handled from your keyboard, without using the buttons and the mouse. The use of keyboard commands is explained in the step-by-step procedures that follow this chapter.

Understanding the CN!Express Screen

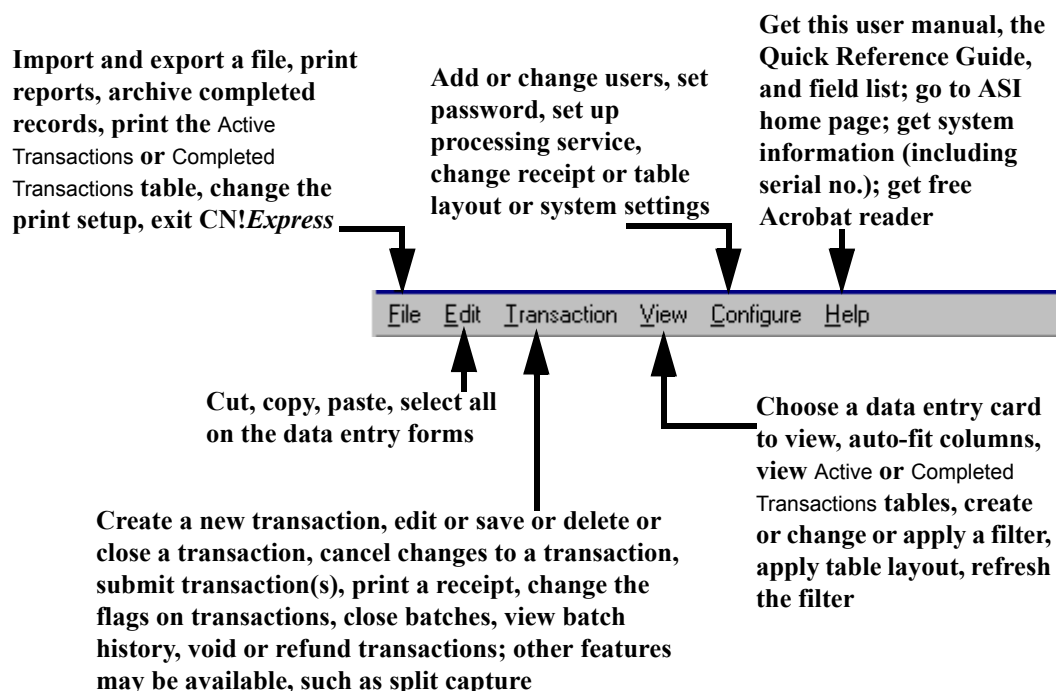


The following sections briefly describe the functions of each part of the screen.

To move around this screen using the keys on your keyboard, press **Tab** to move forward; **Shift Tab** to move back; and **Ctrl Tab** to view the next data entry form.

Menu Bar

The Menu bar contains six menus:



To view these menus using your keyboard, press the **Alt** key and a letter key at the same time, as follows:

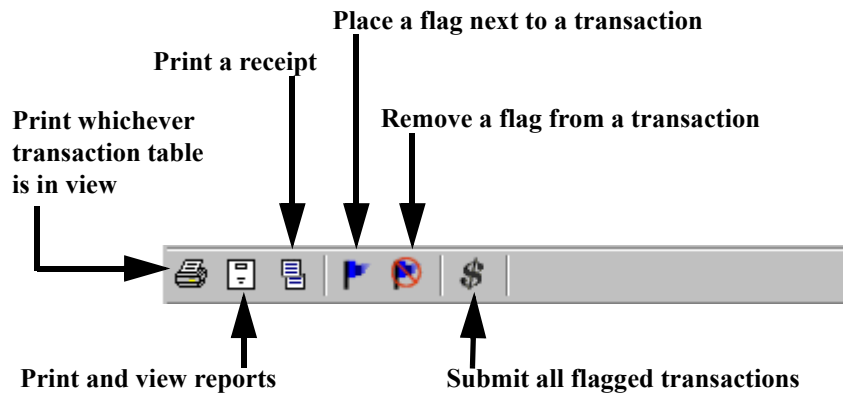
After a menu appears, you can choose an item on the menu by pressing a key on your keyboard. Look for the underlined letter in the item's name and press that key. For example, press **Alt F**, then **T** to Exit (shut down) CN!Express.

Press These Keys Together . . .	To View . . .
Alt F	File menu
Alt E	Edit menu
Alt T	Transaction menu
Alt V	View menu
Alt C	Configure menu
Alt H	Help menu

To leave a menu without making a selection, press **Esc** (not Enter).

Print/Flag Buttons Bar

The Print/Flag Buttons bar contains six buttons:



You can also print by pressing the **Ctrl** key and a letter key as follows:

<i>Press These Keys Together . . .</i>	<i>To Print . . .</i>
Ctrl P	The table you're viewing
Ctrl R	Standard report

Active and Completed Transactions Tables

CN!Express lists information on active transactions and completed transactions.

Active Transactions Table

Click on the Active Transactions tab to view:

Account	Amount	Action	Status	Auth Code	Result Code	Response
0100	\$50.00	Sale	Entered			

All active transactions. 1

Completed Transactions Table

Click on the Completed Transactions tab to view:

Account	Amount	Action	Status	Auth Code	Result Code	Response
0100	\$100.00	Sale	Deposited	0		Approv

All completed transactions. 1

You can also view these tables by pressing the **Ctrl** key and a number key at the top of the keyboard (don't use the keypad):

Press These Keys Together . . .	To View . . .
Ctrl 2	Active Transactions table
Ctrl 3	Completed Transactions table

Columns of Information

The Active Transactions and Completed Transactions tables are set up to show eight columns of information when you first install *CN!Express*:

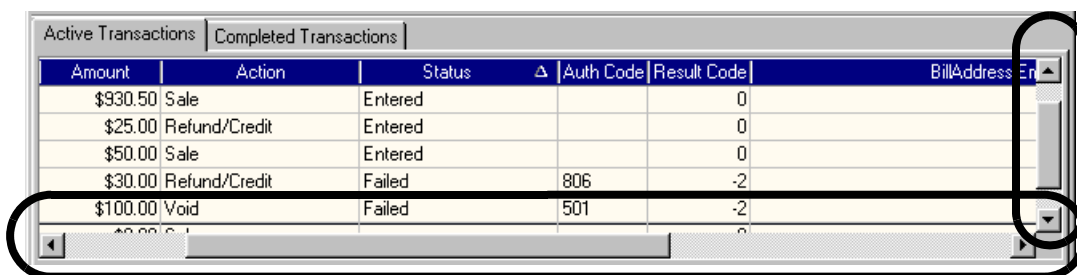
- Flag
- Account
- Amount
- Action
- Status
- Auth Code
- Result Code
- Response Text

You can add columns to show information such as billing name and address, shipping name and address, and order date. For a detailed description of all the possible columns, press **ALT H** (Help), then **F** to view the field reference list.

For information on changing the table layout, see “Chapter 9. Changing Tables: Layout, Sorting, Filtering” on page 103.

Scroll Bars

Once a transaction table contains more columns and/or more transactions than can fit on the screen, scroll bars appear on the bottom and on the right hand side.



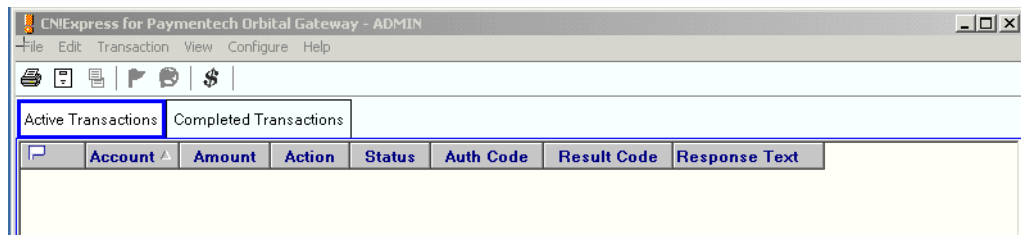
Amount	Action	Status	Auth Code	Result Code	BillAddress
\$930.50	Sale	Entered		0	
\$25.00	Refund/Credit	Entered		0	
\$50.00	Sale	Entered		0	
\$30.00	Refund/Credit	Failed	806	-2	
\$100.00	Void	Failed	501	-2	

Making Columns Fit

In the previous examples, the far left columns (for example, Bill Address) don't fit the screen; you have to scroll to see them. You can automatically re-size (auto-fit) the columns so that they all appear on the screen, with the width of each column adjusted to its contents.

To auto-fit:

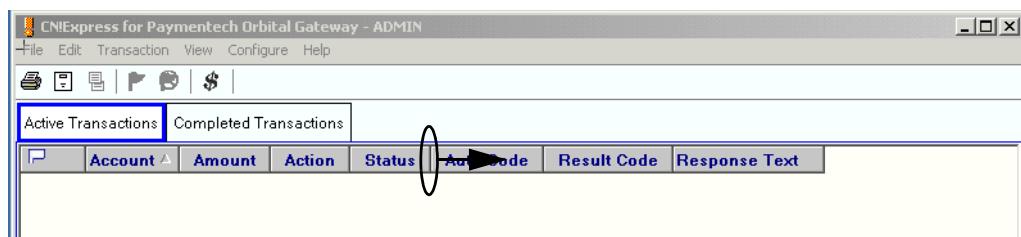
1. Press **ALT V** (View).
2. Press **U** (Auto-Fit Columns) to view:



If your table layout includes more than about 10 columns, you may still need to scroll after you auto-fit. If the contents of a column change (for example, entries are longer), you may want to auto-fit again.

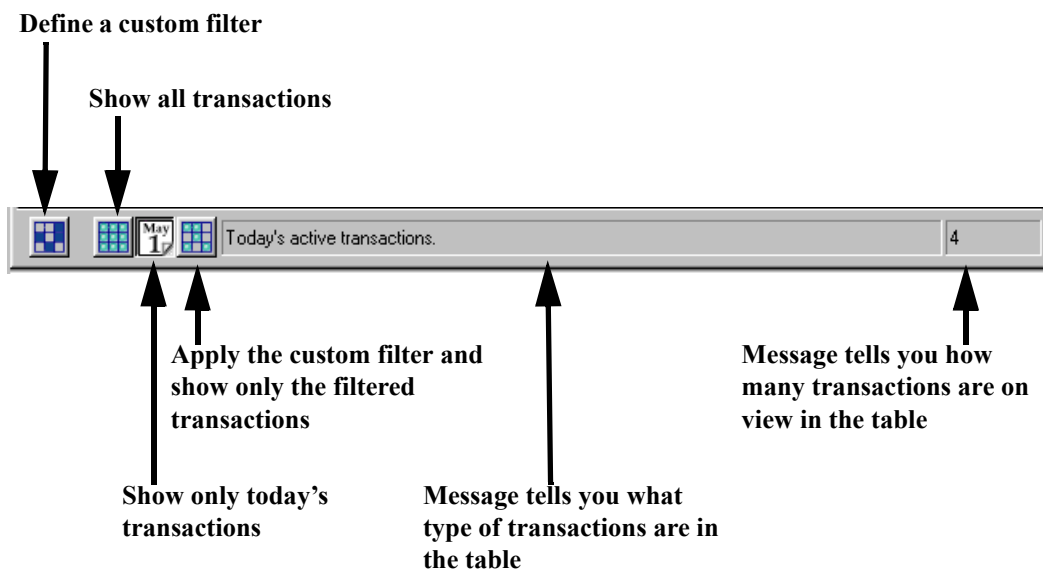
When you "drag," you hold down the left mouse button and slide the entire mouse right or left.

Once you auto-fit, the change remains even if you shut down CN!Express and another user logs on, unless you manually change the size of the columns by dragging. For example, set your cursor on the line between Status and Auth Code, then drag right to increase the width of the Status column (as shown below) or drag left to decrease it.



Filter Buttons/Message Bar

A filter lets you display a selected group of active and/or completed transactions (for example, all of the sales transactions that are over \$100). The Filter Buttons/Message bar contains four buttons and two message areas.



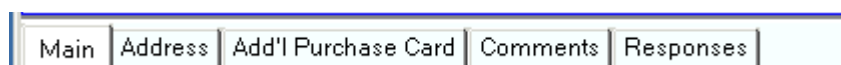
Data Entry Forms

The six data entry forms are Main, Address, Add'l Purchase Card, Comments and Responses. With some processing services, you may see additional tabs (for example, Line Items).

You can't change the data entry forms if you're viewing the Completed Transactions table.

You can add, delete, and change information on all the forms except the Responses form. The Responses form displays information received from your processing service.

To view a form, click on the tab for the form:



You can also view these forms by pressing the following function keys on your keyboard:

<i>Press This Key . . .</i>	<i>To View . . .</i>
F2	Main data entry form
F3	Address data entry form
F4	Add'l Purchase Card data entry form
F5	Line Items data entry form (if available)
F6	Comments data entry form
F7	Responses data entry form

Most boxes (fields) limit the amount or kind of information you can enter. For example, the **Account** box on the Main form lets you type a maximum of 19 characters.

You can move from form-to-form by pressing two keys on your keyboard at the same time: **Ctrl Tab**. You can move from box-to-box within each form by pressing the **Tab** key on your keyboard. You *must* fill in the boxes marked in **bold**.













The boxes you see on each form and the boxes that are bolded will depend on your processing service.

The following is a brief summary of each form.













Main Form

On the Main data entry form, you record information on credit card, purchase card, or check transactions. You *must* fill out the boxes marked in **bold**, especially the account number, expiration date, amount, and action for each new transaction.

Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses
  	Account: <input type="text"/> Exp: <input type="text"/> C V V/CID: <input type="text"/> Class: <input type="text"/>			
	Amount: <input type="text"/> Division ID: <input type="text"/>			
	Action: <input type="text"/> Bill Zip: <input type="text"/>			
	Comment 1: <input type="text"/> Comment 2: <input type="text"/>			
	Auth Code: <input type="text"/>			
Currency: <input type="text"/>		Check Fraud <input type="checkbox"/>		Order No.: <input type="text"/>
<div>          </div>				

Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses
  	Account: <input type="text"/> Exp: <input type="text"/> C V V/CID: <input type="text"/> Class: <input type="text"/>			
	Amount: <input type="text"/> Tax: <input type="text"/> Division ID: <input type="text"/>			
	Action: <input type="text"/> Bill Zip: <input type="text"/> Ship Zip: <input type="text"/> From Zip: <input type="text"/>			
	Comment 1: <input type="text"/> Comment 2: <input type="text"/>			
	Auth Code: <input type="text"/> Cust. Ref.: <input type="text"/> PO Number: <input type="text"/>			
Currency: <input type="text"/>		Check Fraud <input type="checkbox"/>		Order No.: <input type="text"/>
<div>          </div>				

Click on  to view:

The screenshot shows a web-based data entry form for a credit card transaction. At the top, there are tabs: 'Main', 'Address', 'Add'l Purchase Card', 'Comments', and 'Responses'. The 'Main' tab is active. On the left side, there are three icons: 'Credit card', 'Purchase card', and 'Check'. The form fields include: 'Account:' (text box), 'Routing:' (text box), 'Class:' (dropdown menu), 'Amount:' (text box with '\$0.00'), 'Division ID:' (dropdown menu), 'Action:' (dropdown menu), 'Bill Zip:' (text box), 'Acct Type:' (dropdown menu), 'Comment 1:' (text box), 'Comment 2:' (text box), 'First Name:' (text box), 'Middle:' (text box), 'Last Name:' (text box), 'Currency:' (dropdown menu), and 'Order No.:' (text box). At the bottom right, there are navigation buttons: '<<', '<', '>', '>>', a printer icon, a '+' icon, a checkmark icon, an 'x' icon, and a 'Now!' button.

The Class box offers three choices:

- MOTO for transactions received by mail order or telephone (the default)
- E-Commerce for transactions received over the Internet
- Recurring when you're billing an account repeatedly and probably regularly (for example, the account is billed monthly: the first time the account is billed, you select MOTO or E-Commerce; every month after that, you select Recurring)

You may type a comment in the Comment 1 and 2 boxes—information about the transaction that you want to store for your own use. Whatever you type also appears in the Comment 1 and 2 boxes on the Comments data entry form. The same two boxes appear on both forms.


Your Main data entry forms may look different than the ones shown above:

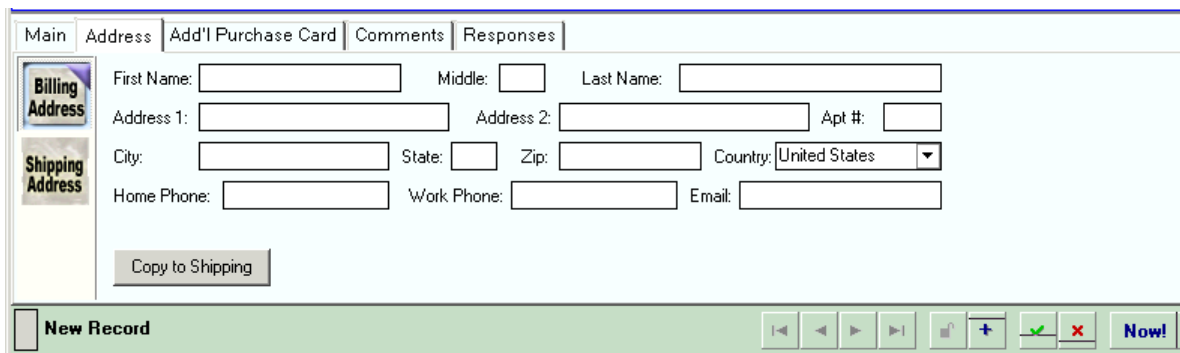
- You may not see some of the buttons and boxes. If you don't see them, you don't need them. For example, international currencies aren't available for some processing services. In that case, you won't see the Currency box. If your processing service does accept international currencies, you can customize the list that appears in the Currency box (see "Setting Up Currencies" on page 134).
- You may see additional buttons and boxes; for example, Customer IP. The Customer IP is used only with transactions received over the Internet (E-commerce). It's shown only if your processing service uses and supports customer IP information.

Address Form

When entering addresses, use numbers wherever possible: 123 3rd Street instead of 123 Third Street.

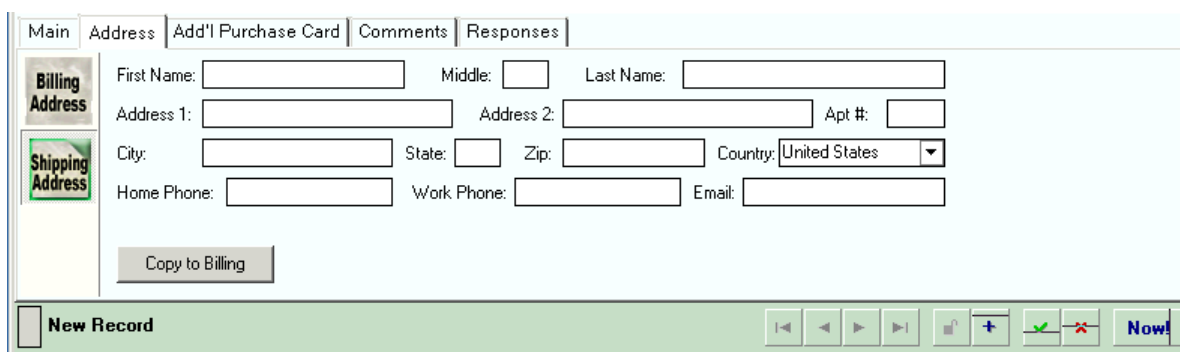
On the Address data entry form, you record the billing and shipping addresses for merchandise.

Click on  to view:



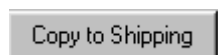
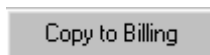
The screenshot shows the Address Form with the 'Billing Address' tab selected. The form includes fields for First Name, Middle, Last Name, Address 1, Address 2, Apt #, City, State, Zip, Country (dropdown menu), Home Phone, Work Phone, and Email. A 'Copy to Shipping' button is visible. The bottom of the form has a 'New Record' button and navigation controls.

Click on  to view:



The screenshot shows the Address Form with the 'Shipping Address' tab selected. The form includes fields for First Name, Middle, Last Name, Address 1, Address 2, Apt #, City, State, Zip, Country (dropdown menu), Home Phone, Work Phone, and Email. A 'Copy to Billing' button is visible. The bottom of the form has a 'New Record' button and navigation controls.

If the bill-to address is the same as the ship-to address, you can quickly copy information from one form to the other by clicking either

 or 


On this form, you can customize the list of countries in the Country box (see “Setting Up Countries” on page 136).

Additional Purchase Card Form

On the Add'l Purchase Card data entry form, you record additional information on purchase cards. Your processing service might require this information for some purchase cards.

To record the order date, do one of the following:

- Either type the date into the Order Date box

- Or click on  to view:

Click on the Customer is Tax Exempt box if the customer is tax exempt. The default is no tax exemption.

Comments Form

On the Comments data entry form, you record and store information for your own use. Your processing service might make use of this information or it might not. In any case, the information is stored with the transaction, even after the transaction is completed. You can display it on the tables, export, and archive it like any other information.

The screenshot shows the 'Comments' tab selected in the top navigation bar. The form contains five input fields: 'Comment 1:', 'Comment 2:', 'Comment 3:', 'Comment 4:', and 'Shipping Ref:'. At the bottom, there is a status bar with a green 'Entered' button, a Mastercard logo with 'MC', and a set of navigation icons (back, forward, search, etc.) followed by a 'Now!' button.

- In the Comment 1, 2, 3, and 4 boxes, type information about the transaction that you want to store for your own use. Whatever you type also appears in the Comment 1 and 2 boxes on the Main data entry form. The same two boxes appear on both forms.
- In Shipping Ref, type shipment information, such as the FedEx number.

Responses Form

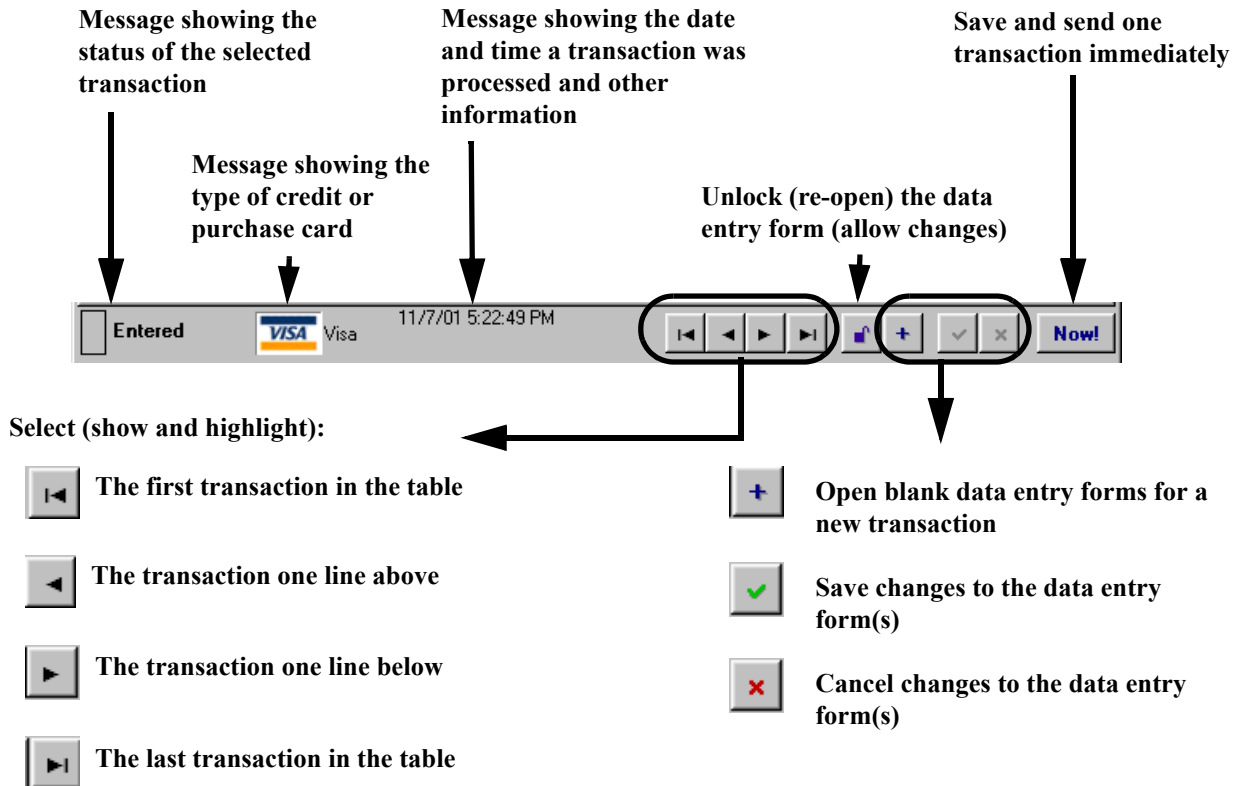
You can view the Responses data entry form, but you can't enter or change information. The processing service fills in this form when it responds to each submitted transaction.

If your processing service supports fraud detection, it sends you the results of its fraud check somewhere on the Responses form. You might see special Fraud Detection boxes on your form. You must contact your processing service directly to find out whether they offer fraud detection, how to set it up, and how the processing service sends fraud information to you.

The screenshot shows the 'Responses' tab selected in the top navigation bar. The form contains several input fields for transaction details: 'TxRefNum:', 'Idx:', 'Batch ID:', 'Result Code:', 'Auth Code:', 'Auth Date:', 'Deposit Date:', 'AVS:', and 'C V V:'. At the bottom, there is a status bar with a green 'Entered' button, a Mastercard logo with 'MC', and a set of navigation icons (back, forward, search, etc.) followed by a 'Now!' button.

Transaction Buttons/Messages Bar

The Transactions Buttons/Messages bar contains two message areas and nine buttons:



You can also perform some of these tasks with the following keys on your keyboard:

<i>Press This Key . . .</i>	<i>To Do This . . .</i>
Up and Down Arrows	To move from transaction to transaction on the transaction table where you're working
Enter	To save changes to the data entry form(s) and also open a blank set of forms for a new transaction
Alt T, then H	To cancel changes to the data entry forms
Ctrl I	To send one selected transaction immediately (Now!)

Status Bar


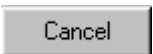
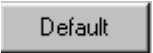
When you move your cursor over a button, the Status bar shows a message explaining what the button does.



It also shows whether the data entry forms are Locked (they can't be changed) or Unlocked (opened; they can be changed).

Standard Buttons and Keyboard Commands

The following buttons appear on many of the screens in CN!Express.

<i>Click on This Button . . .</i>	<i>To Do This . . .</i>
	Save all the changes you just made.
	Undo (cancel) all the changes you just made and return to the CN!Express screen.
	Bring back the original settings for this screen or data entry form that are shipped with CN!Express.

Most of the tasks handled by the CN!Express buttons are also handled by keys on your keyboard. For a summary, see “Appendix D. Keyboard Shortcuts” on page 197.

Chapter 6.

Recording New Transactions

CN!Express connects you directly with your processing service for fast and easy processing of credit cards, purchase cards, and checks. To complete a transaction, you:

Usually, you'll be filling out information on one transaction at a time. You can also import transactions from a file. See "Chapter 13. Importing, Exporting, and Archiving" on page 145.

1. Fill out information on the card holder's transaction using the CN!Express data entry forms.
2. Save the transaction.
3. Send the transaction to your processing service on your own schedule.
4. If the processing service rejects the transaction, you have to change it before you re-send it.

If the processing service accepts the transaction, your work is done!

Your data entry forms may look different from the ones shown in this chapter. Your forms are set up to provide the exact information your processing service needs.

This chapter contains step-by-step instructions for the first two tasks, recording and saving a new transaction. The types of transactions you can record are sale, authorization, delayed capture/deposit, deposit, refund/credit, void, and voice authorization. Your processing service may use different names for these transactions. Some processing services also permit partial voids and split captures.

Sale

When the processing service approves a sales transaction, it takes money (the Amount) from the card holder's account and puts it in the merchant's account.

To record and save a sale transaction:

1. Press **Ctrl 2** to see the Active Transactions table.
2. Press **F2** (Main data entry form).

3. Click on one of the following:






or






or






- Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses
  	Account: <input type="text"/> Exp: <input type="text"/> CVV/CID: <input type="text"/> Class: <input type="text"/>			
	Amount: <input type="text" value="\$0.00"/> Division ID: <input type="text"/>			
	Action: <input type="text" value="Sale"/> Bill Zip: <input type="text"/>			
	Comment 1: <input type="text"/> Comment 2: <input type="text"/>			
	Auth Code: <input type="text"/> Currency: <input type="text"/> Check Fraud <input type="checkbox"/> Order No.: <input type="text"/>			
<div style="text-align: right;"> <input type="button" value="Now!"/> </div>				

- Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses
  	Account: <input type="text"/> Exp: <input type="text"/> CVV/CID: <input type="text"/> Class: <input type="text"/>			
	Amount: <input type="text" value="\$0.00"/> Tax: <input type="text" value="\$0.00"/> Division ID: <input type="text"/>			
	Action: <input type="text" value="Sale"/> Bill Zip: <input type="text"/> Ship Zip: <input type="text"/> From Zip: <input type="text"/>			
	Comment 1: <input type="text"/> Comment 2: <input type="text"/>			
	Auth Code: <input type="text"/> Cust. Ref.: <input type="text"/> PO Number: <input type="text"/>			
Currency: <input type="text"/> Check Fraud <input type="checkbox"/> Order No.: <input type="text"/>				
<div style="text-align: right;"> <input type="button" value="Now!"/> </div>				

- Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses	
  	Account:	<input type="text"/>	Routing:	<input type="text"/>	
	Amount:	<input type="text" value="\$0.00"/>	Division ID:	<input type="text"/>	
	Action:	<input type="text" value="Sale"/>	Bill Zip:	<input type="text"/>	
	Comment 1:	<input type="text"/>			
	Comment 2:	<input type="text"/>			
First Name:	<input type="text"/>	Middle:	<input type="text"/>	Last Name:	<input type="text"/>
Currency:	<input type="text"/>	Order No.:	<input type="text"/>		

Use the **Tab** key on your keyboard to move from box to box, not the **Enter** key. The **Enter** key saves the entire transaction.

- Press **Enter** if needed to open a new data entry form.
- Fill in the required boxes, beginning with the Account number. The required boxes are outlined in **bold**. To move from box to box, press **Tab**.

At a minimum, you *must* fill in the following boxes:


You Must Fill in . . .	For Credit Card . . .	For Purchase Card . . .	For Check . . .
ACCOUNT	Account Number Example: 12345678012345678	Account Number Example: 12345678012345678	Account Number Example: 12345678012345678
EXP	Expiration Date Example: 0204	Expiration Date Example: 0204	
ROUTING			Bank Routing/Transit Number Example: 929999292
AMOUNT	Amount of sale (don't type a dollar sign) Example: 1234.67	Amount of sale (don't type a dollar sign) Example: 1234.67	Amount of sale (don't type a dollar sign) Example: 1234.67

A message like the following appears if the credit card or purchase card account number is valid:



The following message appears if the credit card or purchase card account number is invalid:



6. At the Action box, type **S** (Sale) or click on  to select the action recognized by your processing service).
7. Your processing service might recommend that you fill in more information on the Main data entry form (for example, a Bill Zip). Check with your manager or your processing service.
8. Then list the recommended information here for future reference:

<i>Recommended Fields on Main Form</i>	<i>Fill In . . .</i>

9. Press the following function keys if you need to record additional information:
 - **F3** (Address data entry form)
 - **F4** (Add'l Purchase Card data entry form)
 - **F5** (Line Items data entry form, if available)
 - **F6** (Comments data entry form)
10. Even if there are no **bold** boxes (required fields) on these forms, your processing service may recommend that you fill in additional information. Check with your manager or your processing service.
Then list the recommended information here for future reference:

<i>Recommended Fields on Other Forms</i>	<i>Fill In . . .</i>

<i>Recommended Fields on Other Forms</i>	<i>Fill In . . .</i>
--	----------------------

11. Press **Enter**.

CN!Express saves your transaction, adds it to the Active Transactions table, automatically locks it against further changes, and clears the data entry forms for the next transaction.

Now you can start another new transaction.

Authorization

When the processing service approves an authorization transaction, it reserves enough money in the card holder's account to complete the transaction (the **Amount**), and then holds it as a delayed capture/deposit.

When you send an authorization request, you're asking the processing service to determine if a credit card is valid; and if it is, to reserve money for the transaction. To record and save an authorization transaction:

1. Press **Ctrl 2** to see the Active Transactions table.
2. Press **F2** (Main data entry form).

3. Click on one of the following:



01






O





- Click on to view:







Main	Address	Add'l Purchase Card	Comments	Responses	
  	Account: <input type="text"/>		Exp: <input type="text"/>	CVV/CID: <input type="text"/>	Class: <input type="text"/>
	Amount: <input type="text"/>		Division ID: <input type="text"/>		
	Action: <input type="text"/>		Bill Zip: <input type="text"/>		
	Comment 1: <input type="text"/>		Comment 2: <input type="text"/>		
Auth Code: <input type="text"/>		Currency: <input type="text"/>		Check Fraud <input type="checkbox"/>	Order No.: <input type="text"/>

- Click on  to view:



Main	Address	Add'l Purchase Card	Comments	Responses
 Credit card	Account: <input type="text"/>		Exp: <input type="text"/>	CVV/CID: <input type="text"/>
	Amount: <input type="text"/>	Tax: <input type="text"/>	Division ID: <input type="text"/>	
	Action: <input type="text"/>	Bill Zip: <input type="text"/>	Ship Zip: <input type="text"/>	From Zip: <input type="text"/>
	Comment 1: <input type="text"/>		Comment 2: <input type="text"/>	
 Purchase card	Auth Code: <input type="text"/>		Cust. Ref.: <input type="text"/>	
	Currency: <input type="text"/>	Check Fraud <input type="checkbox"/>	Order No.: <input type="text"/>	

- Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses	
  	Account:	<input type="text"/>	Routing:	<input type="text"/>	
	Amount:	<input type="text" value="\$0.00"/>	Division ID:	<input type="text"/>	
	Action:	<input type="text" value="Authorization"/>	Bill Zip:	<input type="text"/>	
	Comment 1:	<input type="text"/>			
	Comment 2:	<input type="text"/>			
First Name:	<input type="text"/>	Middle:	<input type="text"/>	Last Name:	<input type="text"/>
Currency:	<input type="text"/>	Order No.:	<input type="text"/>		
					

Use the **Tab** key on your keyboard to move from box to box, not the **Enter** key. The **Enter** key saves the entire transaction.

- Press **Enter** if needed to open a new data entry form.
- Fill in the required boxes, beginning with the Account number. The required boxes are outlined in **bold**. To move from box to box, press **Tab**.

At a minimum, you *must* fill in the following boxes:


You Must Fill in . . .	For Credit Card . . .	For Purchase Card . . .	For Check . . .
ACCOUNT	Account Number Example: 12345678012345678	Account Number Example: 12345678012345678	Account Number Example: 12345678012345678
EXP	Expiration Date Example: 0204	Expiration Date Example: 0204	
ROUTING			Bank Routing/Transit Number Example: 929999292
AMOUNT	Amount of sale (don't type a dollar sign) Example: 1234.67	Amount of sale (don't type a dollar sign) Example: 1234.67	Amount of sale (don't type a dollar sign) Example: 1234.67

A message like the following appears if the credit card or purchase card account number is valid:



The following message appears if the credit card or purchase card account number is invalid:



6. At the Action box, type **A** (Authorization) (or click on  to select the action recognized by your processing service).
7. Your processing service might recommend that you fill in more information on the Main data entry form (for example, a Bill Zip). Check with your manager or your processing service.

Then list the recommended information here for future reference:

<i>Recommended Fields on Main Form</i>	<i>Fill In . . .</i>

8. Press the following function keys if you need to record additional information:

- **F3** (Address data entry form)
- **F4** (Add'l Purchase Card data entry form)
- **F5** (Line Items data entry form, if available)
- **F6** (Comments data entry form)

9. Even if there are no **bold** boxes (required fields) on these forms, your processing service may recommend that you fill in additional information. Check with your manager or your processing service.

Then list the recommended information here for future reference:

<i>Recommended Fields on Other Forms</i>	<i>Fill In . . .</i>

<i>Recommended Fields on Other Forms</i>	<i>Fill In . . .</i>
--	----------------------

10. Press **Enter**.

CN!Express saves your transaction, adds it to the Active Transactions table, automatically locks it against further changes, and clears the data entry forms for the next transaction.

Now you can start another new transaction.

Delayed Capture/Deposit

When the processing service approved the authorization, it reserved money in the card holder's account.

When you send a delayed capture/deposit transaction, the processing service actually takes that money (the Amount) from the card holder's account and deposits it in the merchant's account.

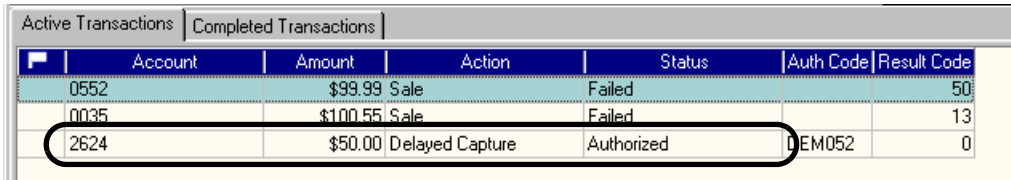
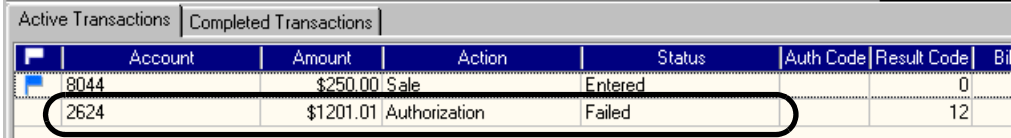
After you send an authorization transaction to your processing service, the processing service decides whether to authorize the transaction or fail it. In either case, the transaction appears on your Active Transactions screen.

Usually, if the authorization is successful, CN!Express automatically creates a delayed capture/deposit transaction, which appears in your Active Transactions table. The ADMIN user can set up CN!Express so that delayed capture/deposits must be created manually; however, this change is *not* recommended. The procedures below explain what you should do in each situation.

Every processing service has its own deadline for completing an authorization and delayed capture. If you send the delayed capture/deposit after that time, the processing service may return the transaction as Failed; or it may automatically generate a new authorization code and complete the transaction. Each processing service treats this situation in its own way.

Handling an Automatic Delayed Capture/Deposit

After your processing service receives the authorization transaction, it processes and sends it back. If the authorization is successful, CN!Express automatically creates a delayed capture/deposit transaction. Here's what you see:

If the Service . . .	The Screen Shows This . . .
Authorizes the transaction	 <p>The screenshot shows the 'Active Transactions' tab selected. The table has columns: Account, Amount, Action, Status, Auth Code, Result Code. Three transactions are listed: Account 0552 for \$99.99 Sale (Failed, Result Code 50), Account 0035 for \$100.55 Sale (Failed, Result Code 13), and Account 2624 for \$50.00 Delayed Capture (Authorized, Auth Code DEM052, Result Code 0). The row for Account 2624 is circled in black.</p>
Does not authorize the transaction	 <p>The screenshot shows the 'Active Transactions' tab selected. The table has columns: Account, Amount, Action, Status, Auth Code, Result Code, Bit. Three transactions are listed: Account 8044 for \$250.00 Sale (Entered, Result Code 0), Account 2624 for \$1201.01 Authorization (Failed, Result Code 12), and a partially visible row for Account 2624. The row for Account 2624 is circled in black.</p>

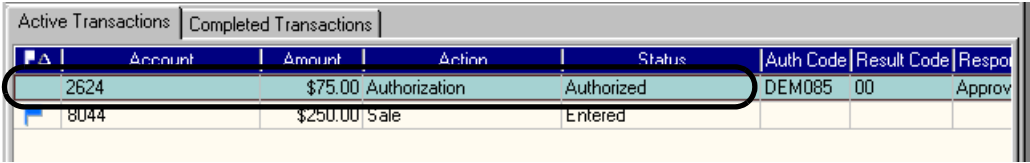
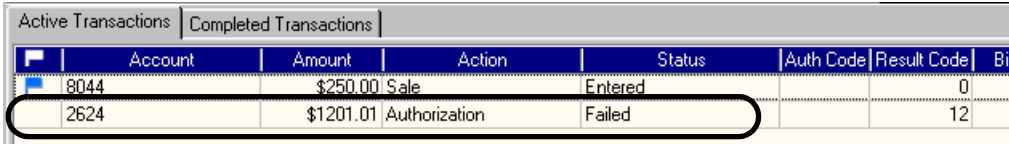
You don't need to fill out or save any information for a delayed capture. (The processing service does that automatically.) But you must flag the Delayed Capture before you send it to the processing service:

1. Click on the delayed capture transaction that you want to submit.
2. Press **Alt T** (Transaction menu).
3. Press **L** (Flag).
4. Press **F** (Flag Selected).


Handling a Manual Delayed Capture/Deposit

To set up manual creation of delayed captures, see "Chapter 11. Customizing Your System Settings" on page 131.

After your processing service receives the authorization transaction, it processes and sends it back. The ADMIN user can set up your system to prevent automatic creation of a delayed capture/deposit. This change isn't recommended; but here's what you see:

<i>If the Service . . .</i>	<i>The Screen Shows This . . .</i>
Authorizes the transaction	
Does not authorize the transaction	

To manually create a delayed capture/authorization:

1. Double click on the successful (Authorized) authorization.
2. In the Main data entry form, tab to the Action box.
3. Press **C** (Delayed Capture) (or click on  to select the action recognized by your processing service).
4. Press **Alt T**, then **S** to save your change.

You must flag the transaction before you submit it.

Refund/Credit

When the processing service approves a refund/credit transaction, it takes money (the **Amount**) from the merchant's account and places it in the card holder's account.

There are two ways to record a refund/credit transaction:

- If the original sale transaction is still on the Completed Transactions table, you can start your refund/credit transaction on the Completed Transactions table.
- If the original sale transaction has been archived, you must start your refund/credit transaction by filling out the Main data entry form.

Only the ADMIN user can decide if you're allowed to issue credits and how much you're allowed to refund (see "Adding a User" on page 15).

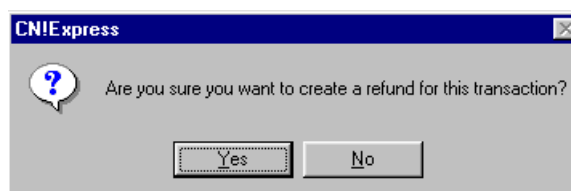
Using the Completed Transaction Table for a Refund/Credit

If the system settings are set to truncate account numbers in the data base, you won't be allowed to use this procedure (see "Changing the General Options" on page 132).

If you don't see the Refund selection on the Transaction menu, you don't have refund/credit privileges.

1. Press **Ctrl 3** to see the Completed Transactions table.
2. Click on the sale transaction you want to refund.
3. Press **Alt T** (Transaction menu).
4. Press **R** (Refund).

The following message is displayed:



5. Press **Y**.
6. CN!Express automatically creates a refund/credit transaction on the Active Transactions table.

Now you can go to the Active Transactions table to process the refund.

Using the Main Data Entry Form for a Refund/Credit

1. Press **Ctrl 2** to see the Active Transactions table.
2. Press **F2** (Main data entry form).

3. Click on one of the following:






or






or







- Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses
  	Account: <input type="text"/> Exp: <input type="text"/> C V V/CID: <input type="text"/> Class: <input type="text"/>			
	Amount: <input type="text"/> Division ID: <input type="text"/>			
	Action: <input type="text"/> Bill Zip: <input type="text"/>			
	Comment 1: <input type="text"/> Comment 2: <input type="text"/>			
	Auth Code: <input type="text"/>			
Currency: <input type="text"/>		Check Fraud <input type="checkbox"/>		Order No.: <input type="text"/>
<div style="text-align: right;"> <input type="button" value="Now!"/> </div>				

- Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses
  	Account: <input type="text"/> Exp: <input type="text"/> C V V/CID: <input type="text"/> Class: <input type="text"/>			
	Amount: <input type="text"/> Tax: <input type="text"/> Division ID: <input type="text"/>			
	Action: <input type="text"/> Bill Zip: <input type="text"/> Ship Zip: <input type="text"/> From Zip: <input type="text"/>			
	Comment 1: <input type="text"/> Comment 2: <input type="text"/>			
	Auth Code: <input type="text"/> Cust. Ref.: <input type="text"/> PO Number: <input type="text"/>			
Currency: <input type="text"/>		Check Fraud <input type="checkbox"/>		Order No.: <input type="text"/>
<div style="text-align: right;"> <input type="button" value="Now!"/> </div>				

- Click on  to view:

Main	Address	Add'l Purchase Card	Comments	Responses
  	Account:	<input type="text"/>	Routing:	<input type="text"/>
	Amount:	<input type="text" value="\$0.00"/>	Division ID:	<input type="text"/>
	Action:	<input type="text" value="Refund/Credit"/>	Bill Zip:	<input type="text"/>
	Comment 1:	<input type="text"/>	Comment 2:	<input type="text"/>
	First Name:	<input type="text"/>	Middle:	<input type="text"/>
	Currency:	<input type="text"/>	Order No.:	<input type="text"/>
				

Use the **Tab** key on your keyboard to move from box to box, not the **Enter** key. The **Enter** key saves the entire transaction.

- Press **Enter** if needed to open a new data entry form.
- Fill in the required boxes, beginning with the Account number. The required boxes are outlined in **bold**. To move from box to box, press **Tab**.

At a minimum, you *must* fill in the following boxes:

You Must Fill in . . .	For Credit Card . . .	For Purchase Card . . .	For Check . . .
ACCOUNT	Account Number Example: 12345678012345678	Account Number Example: 12345678012345678	Account Number Example: 12345678012345678
EXP	Expiration Date Example: 0204	Expiration Date Example: 0204	
ROUTING			Bank Routing/Transit Number Example: 929999292
AMOUNT	Amount of sale (don't type a dollar sign) Example: 1234.67	Amount of sale (don't type a dollar sign) Example: 1234.67	Amount of sale (don't type a dollar sign) Example: 1234.67


A message like the following appears if the credit card or purchase card account number is valid:



The following message appears if the credit card or purchase card account number is invalid:



If you don't see the Refund or Credit selection at the Action box, you don't have refund/credit privileges.

6. At the Action box, press **R** (Refund/Credit) (or click on  to select the action recognized by your processing service).
7. Your processing service might recommend that you fill in more information on the Main data entry form (for example, a Bill Zip). Check with your manager or your processing service.

Then list the recommended information here for future reference:

<i>Recommended Fields on Main Form</i>	<i>Fill In . . .</i>

8. Press the following function keys if you need to record additional information:
 - **F3** (Address data entry form)
 - **F4** (Add'l Purchase Card data entry form)
 - **F5** (Line Items data entry form, if available)
 - **F6** (Comments data entry form)
9. Even if there are no **bold** boxes (required fields) on these forms, your processing service may recommend that you fill in additional information. Check with your manager or your processing service. Then list the recommended information here for future reference:

<i>Recommended Fields on Other Forms</i>	<i>Fill In . . .</i>

10. Press **Enter**.

CN!Express saves your transaction, adds it to the Active Transactions table, automatically locks it against further changes, and clears the data entry forms for the next transaction.

Now you can start another new transaction.

Void

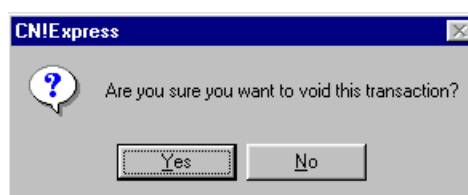
When the processing service approves a void transaction, it stops a transaction you already completed. The transaction never appears on the credit card holder's statement.

If your processing service permits partial voids, a different message may be displayed.

To record a void transaction:

1. Press **Ctrl 3** to see the Completed Transactions table.
2. Click on the transaction you want to void.
3. Press **Alt T** (Transaction menu).
4. Press **V** (Void).

A message like the following is displayed:



5. Press **Y**.
6. *CN!Express* automatically creates a Void transaction on the Active Transactions table:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Response
	0035	\$200.00	Sale	Entered			
	1227	\$100.00	Refund/Credit	Entered			
	4006	\$100.00	Void	Entered			

The original transaction remains on the Completed Transactions table. The void on the Active Transactions table is treated like any other a new transaction (it must be flagged and submitted before it takes effect).

Now you can go to the Active Transactions table and start another transaction.

Each processing service has its own deadline for completing a void. If you send the void after that time, the processing service may return the transaction as Failed and nothing is voided.

Voice Authorization and Capture (Forced Capture)

Your processing service provides you with the phone number for the Voice Authorization Network. When you need an authorization code, you phone the network. You must then type the authorization code onto the Main data entry form before you submit the transaction. If you omit the code, the processing service won't process the transaction.

You can only ask for an voice authorization on a sale. When you receive authorization by phone, you should:




1. Press **Ctrl 2** to see the Active Transactions table.
2. Press **F2** (Main data entry form).

3. Click on one of the following:






- Click on  Credit to view:



Main	Address	Add'l Purchase Card	Comments	Responses	
  	Account: <input type="text"/>		Exp: <input type="text"/>	CVV/CID: <input type="text"/>	Class: <input type="text"/>
	Amount: <input type="text"/>		Division ID: <input type="text"/>		
	Action: <input type="text"/>		Bill Zip: <input type="text"/>		
	Comment 1: <input type="text"/>		Comment 2: <input type="text"/>		
Auth Code: <input type="text"/>		Currency: <input type="text"/>			
		Check Fraud <input type="checkbox"/>		Order No.: <input type="text"/>	

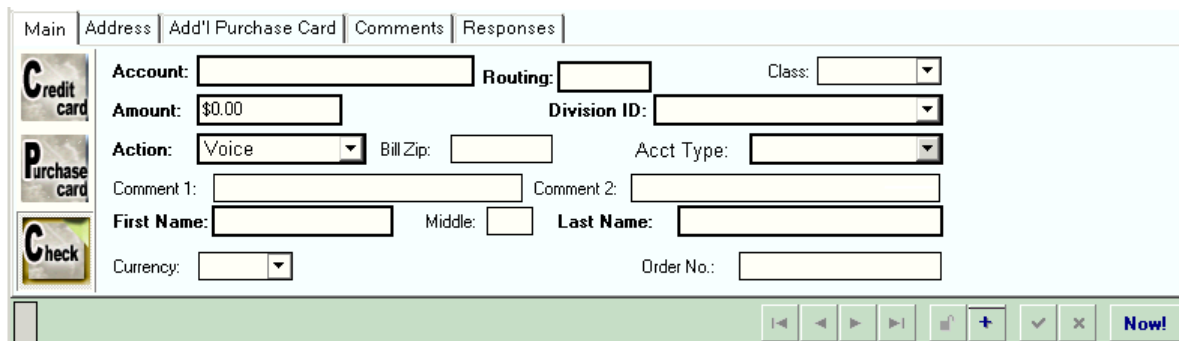
- Click on  to view:



Main	Address	Add'l Purchase Card	Comments	Responses
 Credit card	Account: <input type="text"/>		Exp: <input type="text"/>	CVV/CID: <input type="text"/> Class: <input type="text"/>
	Amount: <input type="text" value="\$0.00"/>		Tax: <input type="text" value="\$0.00"/>	Division ID: <input type="text"/>
	Action: <input type="text" value="Voice"/>		Bill Zip: <input type="text"/>	Ship Zip: <input type="text"/> From Zip: <input type="text"/>
	Comment 1: <input type="text"/>		Comment 2: <input type="text"/>	
 Purchase card	Auth Code: <input type="text"/>		Cust. Ref.: <input type="text"/>	PO Number: <input type="text"/>
	Currency: <input type="text"/>	Check Fraud <input type="checkbox"/>	Order No.: <input type="text"/>	
 Check				

Most processing services don't give authorization codes for checks.

- Click on  to view:



Use the **Tab** key on your keyboard to move from box to box, not the **Enter** key. The **Enter** key saves the entire transaction.

- Press **Enter** if needed to open a new data entry form.
- Fill in the required boxes, beginning with the Account number. The required boxes are outlined in **bold**. To move from box to box, press **Tab**.

At a minimum, you *must* fill in the following boxes:


<i>You Must Fill in . . .</i>	<i>For Credit Card . . .</i>	<i>For Purchase Card . . .</i>	<i>For Check . . .</i>
ACCOUNT	Account Number Example: 12345678012345678	Account Number Example: 12345678012345678	Account Number Example: 12345678012345678
EXP	Expiration Date Example: 0204	Expiration Date Example: 0204	
ROUTING			Bank Routing/Transit Number Example: 929999292
AMOUNT	Amount of sale (don't type a dollar sign) Example: 1234.67	Amount of sale (don't type a dollar sign) Example: 1234.67	Amount of sale (don't type a dollar sign) Example: 1234.67
AUTH CODE	Authorization code given to you during the voice authorization Example: 123456	Authorization code given to you during the voice authorization Example: 123456	Authorization code given to you during the voice authorization Example: 123456

A message like the following appears if the credit card or purchase card account number is valid:



The following message appears if the credit card or purchase card account number is invalid:



6. At the Action box, press **V** (Voice Authorization) (or click on  to select the action recognized by your processing service).
7. At the Auth Code box, fill in the code you received from the processing service.
8. Your processing service might recommend that you fill in more information on the Main data entry form (for example, a Bill Zip). Check with your manager or your processing service.

Then list the recommended information here for future reference:

<i>Recommended Fields on Main Form</i>	<i>Fill In . . .</i>

9. Press the following function keys if you need to record additional information:
 - **F3** (Address data entry form)
 - **F4** (Add'l Purchase Card data entry form)
 - **F5** (Line Items data entry form, if available)
 - **F6** (Comments data entry form)
10. Even if there are no **bold** boxes (required fields) on these forms, your processing service may recommend that you fill in additional information. Check with your manager or your processing service.

Then list the recommended information here for future reference:

<i>Recommended Fields on Other Forms</i>	<i>Fill In . . .</i>

11. Press **Enter**.

CN!*Express* saves your transaction, adds it to the Active Transactions table, automatically locks it against further changes, and clears the data entry forms for the next transaction.

Now you can start another new transaction.

Partial Void

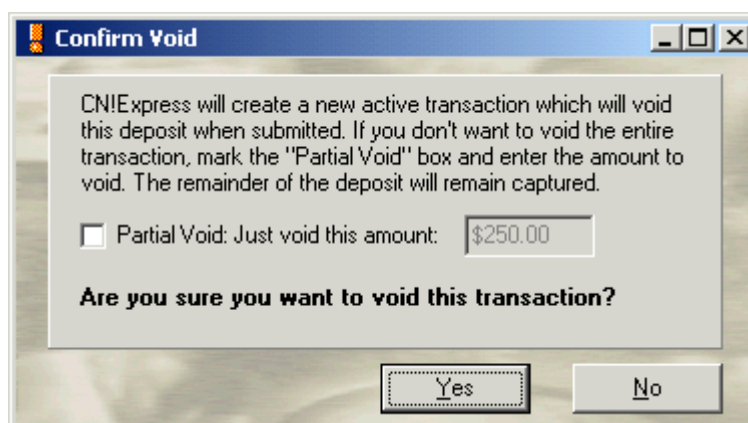
When a processing service approves a partial void transaction, it stops part of a transaction you already completed. That part of the transaction never appears on the credit card holder's statement.

A partial void lets you void part of a transaction. You might want to use a partial void (for example) if a customer buys \$250 worth of goods and then cancels one item worth \$40; you issue a partial void for just \$40 of the transaction.

Each processing service has its own deadline for completing a partial void. If you send the void after that time, the processing service may return the transaction as Failed and nothing is voided.

To record a partial void transaction:

1. Press **Ctrl 3** to see the Completed Transactions table.
2. Click on the transaction you want to partially void.
3. Press **Alt T** (Transaction menu).
4. Press **V** (Void) to view:



5. If you would like a partial void, click on the box next to Partial Void, then fill in the amount you want voided (for this example, say \$100).
6. Press **ENTER**.
7. CN!Express automatically creates a Void transaction on the Active Transactions table for the amount you specified:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Respor
	0035	\$200.00	Sale	Entered			
	1227	\$100.00	Refund/Credit	Entered			
	4006	\$100.00	Void	Entered			

The original transaction remains on the Completed Transactions table. The partial void on the Active Transactions table is treated like any other new transaction.

Now you can return to the Active Transactions table and start another transaction.

Split Capture

When the processing service approved the authorization, it reserved money in the card holder's account.

When you send a split capture/deposit transaction, the processing service actually takes part of that money (part of the Amount) from the card holder's account and deposits it in the merchant's account.

Split captures let you submit part of a delayed capture transaction. You might want to use a split capture (for example) if part of an order ships before the rest of the order; the split capture lets you process only the part that shipped. The following example assumes an original order of \$150. Only part of the order (worth \$50) was shipped.

To record and save a split capture transaction:

1. Press **Ctrl 2** to see the Active Transactions table.
2. Click on the delayed capture transaction you want to partially capture. For example:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Response
	6102	\$50.00	Sale	Entered			
	0944	\$150.00	Void	Entered			
	2624	\$150.00	Delayed Capture	Authorized	DEM006	00	Approved

3. Press **Alt T** (Transaction menu).
4. Press **I** (Split Capture) to view:

Split Capture

CN!Express will split this capture into two transactions, allowing you to capture part of the authorized amount when only part of an order has been shipped.

Capture Amount for This Transaction:

Remaining (Will be Placed in a New Active Transaction):

☐ Flag Original Transaction (Optional)

5. At the Capture Amount for this Transaction box, fill in the amount of the transaction you want to capture.

The rest of the amount appears automatically in the Remaining box, as shown below.

6. Let's say you only want to capture \$50 of the original \$150 transaction. Type **50** in the Capture Amount box.

That original transaction wasn't flagged. If you want to flag the \$50 portion (the Capture Amount) automatically, click on the box next to Flag Original Transaction.

Now your screen looks like this:

Say your original transaction actually was flagged. In that case, you just ignore the Flag Original Transaction box. The Capture Amount is flagged, even if the box isn't check-marked.

7. Press **Enter**. Both transactions appear on the Active Transactions table. Since you clicked on the box in Step 6, a flag now appears next to the \$50 transaction, as shown below:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Response
<input type="checkbox"/>	6102	\$50.00	Sale	Entered			
<input type="checkbox"/>	8844	\$150.00	Void	Entered			
<input checked="" type="checkbox"/>	2624	\$50.00	Delayed Capture	Authorized	DEM006	00	Approv
<input type="checkbox"/>	2624	\$100.00	Delayed Capture	Authorized	DEM006	00	Approv

You can split any delayed capture as many times as you want. For example, you could split both the \$100 transaction above and the \$50 transaction. The split captures are treated like any other new transaction. Split captures are tracked on the Responses data entry form.

Now you can start another new transaction.

Chapter 7.

Sending Transactions

After you record and save your transaction, you're ready to send it to your processing service.

You can record and send individual transactions in one step if you want to.


In most cases, however, you want to record a lot of transactions and then send them in a group to your processing service. This procedure has two advantages. First, it lets you make changes to any of the transactions before you send them. Second, it cuts down on processing time, since many transactions are processed in a group.

This chapter describes how to send transactions in a group, how to save and send one transaction in one step, and what happens after you send a transaction.

Sending Several Transactions in a Group

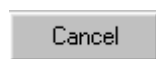
After you record and save transactions, you must send them to the processing service.

To send several active transactions in a group:

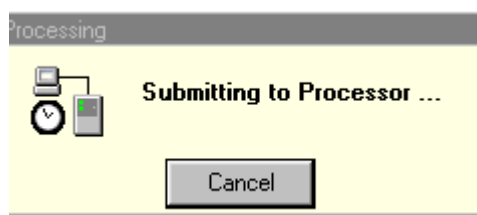
1. Make sure  appears next to every transaction you want to send to your processing service. If a flag doesn't appear:
 - Click on the transaction.
 - Press **Alt T** (Transaction menu).
 - Press **A** (Flag).
 - Press **F** (Flag Selected).
2. Press **Alt T** (Transaction menu).
3. Press **F** (Submit Flagged).

The following message appears on the screen:

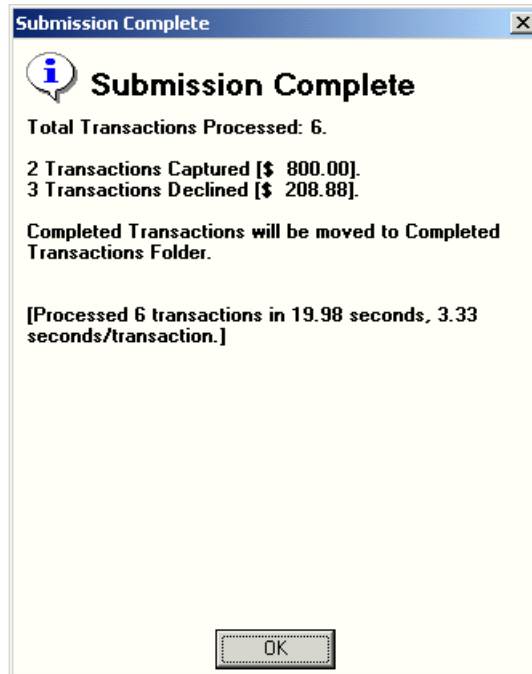
If you press



the submission stops but only after it finishes the transaction it's currently processing. A summary report pops up to tell you how many transactions reached the processing service before you pressed the button.



4. Wait until the message disappears (the processing service finishes with the transactions). A report appears automatically:



5. Press **Enter**.

The submission is finished.

Saving and Sending One Transaction in One Step

Most processing services allow one-step submission for all types of transactions. If you think your processing service limits the use of this feature, contact the processing service or see “Appendix C. Processing Service Information” on page 193.

To save and send a single transaction in one step:

1. Fill out the data entry forms for the transaction.

Do *not* press the Enter key on your keyboard.

2. Press **Ctrl I**.

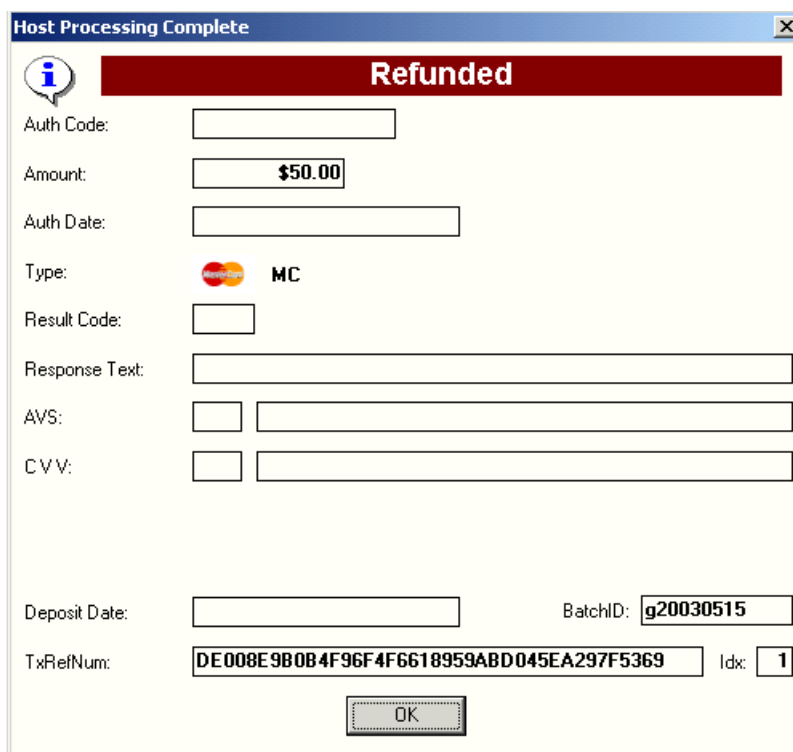
The transaction is automatically saved and sent to your processing service. You receive a message like the following:

You can click on



at Step 2 instead of pressing **Ctrl I**.

You can also use **Ctrl I** to send a single transaction after you've saved it. Click on the transaction to select it; then press **Ctrl I**.

A screenshot of a "Host Processing Complete" dialog box. The title bar is blue with the text "Host Processing Complete" and a close button. The main area has a red header with the word "Refunded" in white. Below the header, there are several fields: "Auth Code:" with an empty text box; "Amount:" with a text box containing "\$50.00"; "Auth Date:" with an empty text box; "Type:" with a Mastercard logo and the text "MC"; "Result Code:" with an empty text box; "Response Text:" with a long empty text box; "AVS:" with two empty text boxes; "CVV:" with two empty text boxes; "Deposit Date:" with an empty text box; "BatchID:" with a text box containing "g20030515"; "TxRefNum:" with a text box containing "DE008E9B0B4F96F4F6618959ABD045EA297F5369"; and "Idx:" with a text box containing "1". At the bottom center is an "OK" button.

3. Press **Enter**.

What Happens after You Send a Transaction

When your processing service finishes processing the transactions, here's what you'll see in *CN!Express*:

The Action Was . . .	When the Processing Service Accepts a Transaction . . .	When the Processing Service Rejects a Transaction . . .
Authorization (sales only)	The transaction stays in the Active Transactions table; the action becomes Delayed Capture/Deposit.	The transaction stays in the Active Transactions table; status is Failed (you may need to fix the problem before you resend it).
Sale or Refund/Credit or Delayed Capture/Deposit or Void or Voice Authorization	The transaction moves to the Completed Transactions table (you don't have to do anything).	The transaction stays in the Active Transactions table; status is Failed (you must fix the problem before you resend it).

In all cases the failed transaction is no longer flagged.

Active Transactions

Completed Transactions

	Account	Amount	Action	Status	Auth Code	Result Code
	0552	\$99.99	Sale	Failed		50
	0035	\$100.55	Sale	Failed		13
	2624	\$50.00	Delayed Capture	Authorized	DEM052	0

The reason for the failure appears on the Responses data entry form. You may decide to close or delete the transaction; if you decide to resend the transaction, you should fix the problem first.


What Happens on the Responses Form

CN!Express receives a response from the processing service for each transaction you send; it adds the response to its database of information on the transaction. This information is shown on the Responses data entry form.

To view the Responses data entry form, press **F7**.

The following is an example of a response:

Main	Address	Add'l Purchase Card	Comments	Responses
TxRefNum: DE007CD1F73BDF3722667286BF20A9D035381DD8 Idx: 0 Batch ID: g20030515				
Result Code: 91 Approved Low Fraud				
Auth Code: DEM068				
Auth Date: 5/15/2003 10:15:42 AM Deposit Date: 5/15/2003 10:15:42 AM				
AVS: A Zip Match/Zip 4 Match/Locale No Match C V V: P Not Processed				

Captured

MC
5/15/2003 10:15:42 AM
Auth Code: DEM068


Your processing service may not support fraud detection. Contact your processing service directly to find out if fraud detection is available and how to set it up.

If your processing service offers fraud detection, it might place the fraud information in the Fraud Detection boxes shown above or in some other part of the Response form. Fraud detection information can help you decide whether to complete a transaction. If the chances of fraud are high, you may want to close or void the transaction.

To see more information about fraud detection:

1. Click on **Details...** (if available) to view:

Fraud Detection Details


Transaction Scored Successfully
Score: 314

The following reason was given:
1. [16] High-risk merchant + amount activity

The following 2 exceptions were returned:
[102] BIN number for credit card is made available through one of the hacker programs available from the World Wide Web.
[107] Billing address is not a US address.

OK

2. When you've finished reading the details, press **Enter**.

For information on how your specific processing service uses the Responses data entry form, contact your processing service.

Chapter 8.

Changing and

Flagging

Transactions

You can't change information on completed transactions, only on active transactions.

You might want to change an active transaction for any number of reasons. For example:

- You need to correct a mistake in the data entry forms.
- You need to fix the transaction after the processing service declined it.
- The card-holder asked you to cancel the transaction, and you need to delete or close it.

This chapter contains step-by-step instructions for selecting a transaction, changing it, and deleting or closing it. It also explains how to flag and unflag transactions.

Selecting a Transaction

Selecting One Transaction

You select a transaction by clicking on it or by moving to it using the **Up** and **Down Arrow** keys on your keyboard. A selected transaction is highlighted and/or surrounded by a dotted line:

Active Transactions		Completed Transactions			
	Account	Amount	Action	Card Type	Status
	6102	\$50.00	Sale	MC	Entered
	8044	\$250.00	Sale	MC	Entered
	3574	\$20.00	Refund/Credit	MC	Entered
	5040	\$75.00	Refund/Credit	Visa	Entered
	2624	\$100.00	Sale	Visa	Entered

Selecting Several Transactions That Are Listed Next to Each Other

Suppose you want to select the first three transactions shown above.

You can also hold down the **Shift** key while you press the **Down Arrow** key.

1. Click on the first transaction.
2. Hold down the **Shift** key on your keyboard
3. Click on the last transaction you want to select.
4. Release the **Shift** key.

All the transactions between your clicks are highlighted:

Active Transactions		Completed Transactions			
	Account	Amount	Action	Card Type	Status
	6102	\$50.00	Sale	MC	Entered
	8044	\$250.00	Sale	MC	Entered
	3574	\$20.00	Refund/Credit	MC	Entered
	5040	\$75.00	Refund/Credit	Visa	Entered
	2624	\$100.00	Sale	Visa	Entered

Selecting Several Transactions That Are Not Listed Next to Each Other

Suppose you want to select just the flagged transactions shown above.

1. Click on the first flagged transaction.
2. Hold down the **Ctrl** key on your keyboard
3. Click on each of the flagged transactions.
4. Release the **Ctrl** key.

The exact transactions you click on are highlighted:

Active Transactions		Completed Transactions			
	Account	Amount	Action	Card Type	Status
<input checked="" type="checkbox"/>	6102	\$50.00	Sale	MC	Entered
<input type="checkbox"/>	8044	\$250.00	Sale	MC	Entered
<input checked="" type="checkbox"/>	3574	\$20.00	Refund/Credit	MC	Entered
<input type="checkbox"/>	5040	\$75.00	Refund/Credit	Visa	Entered
<input checked="" type="checkbox"/>	2624	\$100.00	Sale	Visa	Entered

Removing One Transaction from a Selected Group

Suppose you've selected several transactions and want to remove one from the group:

1. Hold down the **Ctrl** key on your keyboard.
2. Click on the transaction you want to remove.
3. Release the **Ctrl** key and the transaction is no longer selected.

Changing (Editing) an Active Transaction

Instead of double clicking in Step 1, you can select the transaction, then do one of the following:

Either press Alt T, then E

Or click on



To change or add to the information for any active transaction:

1. Double click on the transaction.

Change the information on any of the data entry forms.

2. When you've completed your changes, do one of the following:

- Either save the changes: Press **Alt T**, then **S**.
- Or cancel the changes: Press **Alt T**, then **H**.

You can't save your edits by pressing Enter.

Now you can work on another transaction.

Deleting or Closing an Active Transaction

You can't delete or close a completed transaction.

If you delete an active transaction, the transaction does not go through (for example, no refund is made), you remove it entirely from the system and no record is kept that the transaction ever existed.

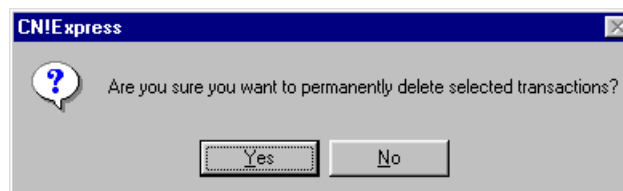
If you close an active transaction, the transaction does not go through (for example, no refund is made), but a record is kept. The closed transaction appears on the Completed Transactions table and can be exported or archived like any other transaction.

Deleting a Transaction

To delete an active transaction:

1. Click on the transaction.
2. Press **Alt T** (Transaction menu).
3. Press **D** (Delete).

The following message appears:



4. Press **Y** (Yes).

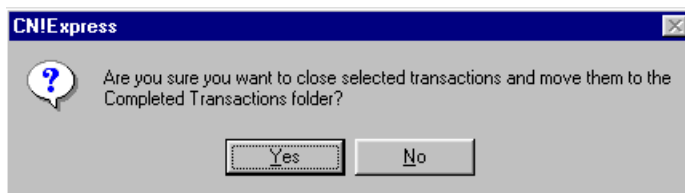
The transaction disappears from the Active Transactions table. It is never submitted and no record is kept that it ever existed.

Closing a Transaction

To close an active transaction:

1. Click on the transaction.
2. Press **Alt T** (Transaction menu).
3. Press **C** (Close).

The following message appears:



4. Press **Y** (Yes).

The transaction disappears from the Active Transactions table. It is never submitted. However, a record is kept and the transaction appears on the Completed Transactions table. For example:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	De
	6102	\$50.00	Void	Voided		0	
	3574	\$20.00	Refund/Credit	Refunded		0	
	5040	\$75.00	Refund/Credit	Closed		0	

Requesting Fraud Detection on a Transaction

You must always arrange for fraud detection directly with your processing service. Some processing services do not support fraud detection at all.

Your processing service may allow you to request fraud detection on individual transactions. The default is that submitted transactions are *not* checked for fraud. You can request fraud checking in two ways:

- By changing the default in the user set up (see “Setting Up Other Users” on page 15). Only the ADMIN user can change the default.
- By requesting fraud checking for an individual transaction on the Main data entry form.

If your processing service allows you to request fraud detection, a Check Fraud box appears on the Main data entry form:

The screenshot shows a light blue rectangular form. On the left, there are two labels: 'Auth Code:' followed by a small rectangular input box, and 'Currency:' followed by another small rectangular input box. In the center, there is a rounded rectangular button labeled 'Check Fraud' with a small square checkbox to its right. On the right side of the form, there is a label 'Order No.:' followed by a larger rectangular input box. The 'Check Fraud' button and its checkbox are highlighted with a dark border.

If a check-mark appears automatically for every new transaction, the default has been changed and every transaction is automatically checked for fraud. If the box is blank for new transactions, then transactions aren't automatically checked for fraud but you can manually request fraud checking.

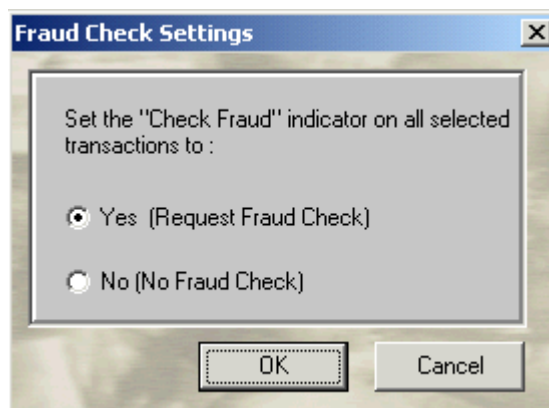
The following sections describe how to manually mark or unmark a transaction for a fraud check.

Marking a Transaction So It's Checked for Fraud

To mark one or more transactions for fraud detection:

1. Select the transaction(s).
2. Press **Alt T** (Transaction menu).
3. Press **U** (Fraud Detection).

The following message appears:



By default, Yes is selected (a dot appears in the radio button).

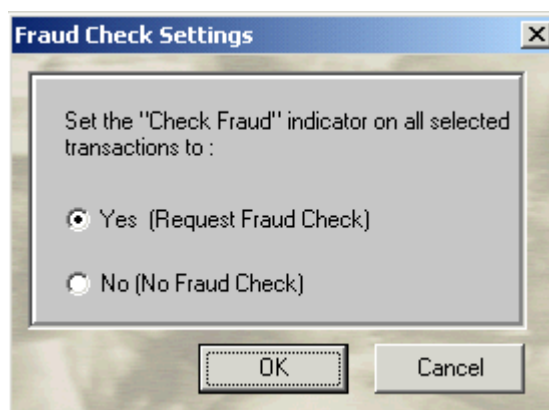
4. Press **Enter**. On the Main data entry form for the transaction(s), a check-mark appears in the Check Fraud box.

Unmarking a Transaction So It's Not Checked for Fraud

To unmark one or more transactions (they won't be checked for fraud):

1. Select the transaction(s).
2. Press **Alt T** (Transaction menu).
3. Press **U** (Fraud Detection).


The following message appears:



4. Click the radio button next to No (No Fraud Check).
5. Press **Enter**. On the Main data entry form for the transaction(s), the check-mark disappears from the Check Fraud box.

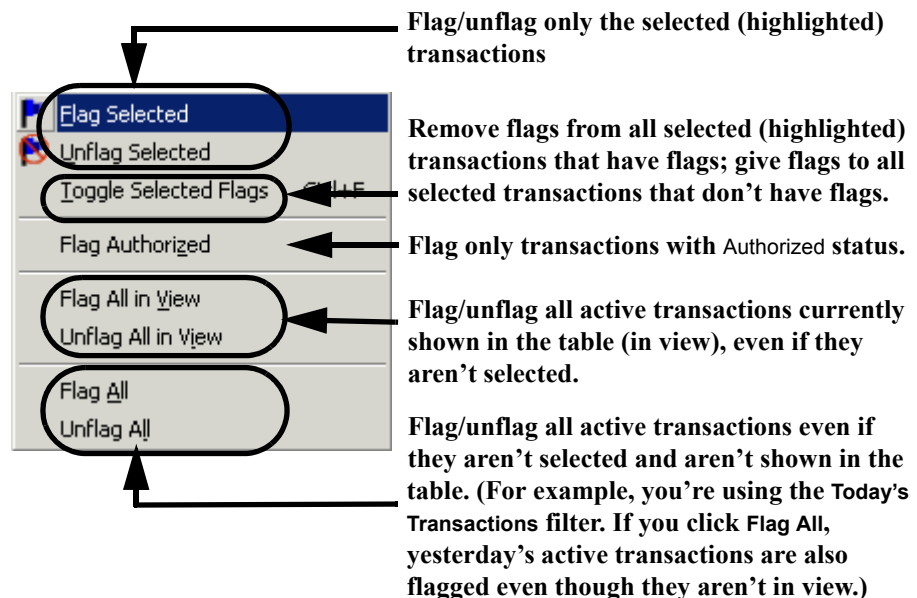
Flagging or Unflagging an Active Transaction

CN!Express uses flags in the Active Transactions table to show which transactions will be sent to your processing service.

- A flag () means that the transaction is ready to send.
- No flag means the transaction isn't ready to send.

CN!Express automatically places a flag next to every new transaction when you save it. You can also add and remove flags yourself.

1. Press **Alt T** (Transaction menu).
2. Press **L** (Flag) to view:



3. To choose one of the menu items, press the key for an underlined letter. For example:
 - To Flag Selected transactions, press the **F** key on your keyboard.
 - To Unflag All, press the **L** key on your keyboard.

If you want to Toggle Selected Flags, you can skip the steps above and press **Ctrl F**.

Suppose you set up your screen as follows, with three transactions selected and all refund transactions filtered out (not showing):

Active Transactions		Completed Transactions					
<input type="checkbox"/>	Account	Amount ▲	Action	Status	Auth Code	Result Code	Response Text
<input checked="" type="checkbox"/>	8044	\$25.00	Authorization and Capture	Entered			
<input checked="" type="checkbox"/>	4006	\$25.00	Authorization and Capture	Entered			
<input checked="" type="checkbox"/>	1008	\$50.00	Authorization and Capture	Entered			
<input type="checkbox"/>	3574	\$75.00	Authorization	Entered			
<input type="checkbox"/>	2028	\$90.01	Authorization	Entered			
	2028	\$100.00	Capture	Authorized	DEM019	00	Approved







The following table shows what happens as to your screen as you select each type of flag.

<i>If You Press . . .</i>	<i>The Screen Shows . . .</i>																																																								
ALT T, L, F (FLAG SELECTED)	<table><tr><th></th><th>Account</th><th>Amount ▲</th><th>Action</th><th>Status</th><th>Auth Code</th><th>Result Code</th><th>Response Text</th></tr><tr><td></td><td>8044</td><td>\$25.00</td><td>Authorization and Capture</td><td>Entered</td><td></td><td></td><td></td></tr><tr><td></td><td>4006</td><td>\$25.00</td><td>Authorization and Capture</td><td>Entered</td><td></td><td></td><td></td></tr><tr><td></td><td>1008</td><td>\$50.00</td><td>Authorization and Capture</td><td>Entered</td><td></td><td></td><td></td></tr><tr><td></td><td>3574</td><td>\$75.00</td><td>Authorization</td><td>Entered</td><td></td><td></td><td></td></tr><tr><td></td><td>2028</td><td>\$90.01</td><td>Authorization</td><td>Entered</td><td></td><td></td><td></td></tr><tr><td></td><td>2028</td><td>\$100.00</td><td>Capture</td><td>Authorized</td><td>DEM019</td><td>00</td><td>Approved</td></tr></table>		Account	Amount ▲	Action	Status	Auth Code	Result Code	Response Text		8044	\$25.00	Authorization and Capture	Entered					4006	\$25.00	Authorization and Capture	Entered					1008	\$50.00	Authorization and Capture	Entered					3574	\$75.00	Authorization	Entered					2028	\$90.01	Authorization	Entered					2028	\$100.00	Capture	Authorized	DEM019	00	Approved
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*If You Press . . .***ALT T, L, A**
(FLAG ALL)

NOTE: THE FILTERED
REFUND TRANSACTIONS
(NOT SEEN) ARE ALSO
FLAGGED.

The Screen Shows . . .

	Account	Amount ▲	Action	Status	Auth Code	Result Code	Response Text
	8044	\$25.00	Authorization and Capture	Entered			
	4006	\$25.00	Authorization and Capture	Entered			
	1008	\$50.00	Authorization and Capture	Entered			
	3574	\$75.00	Authorization	Entered			
	2028	\$90.01	Authorization	Entered			
	2028	\$100.00	Capture	Authorized	DEM019	00	Approved

Chapter 9.

Changing Tables: Layout, Sorting, Filtering

CN!Express lists information on active transactions and completed transactions on two separate tables. You can change the appearance of these tables in several ways:

- By changing the layout of the table(s) (adding, removing or re-ordering columns of information)
- By sorting the information on transactions
- By filtering out (hiding) certain transactions

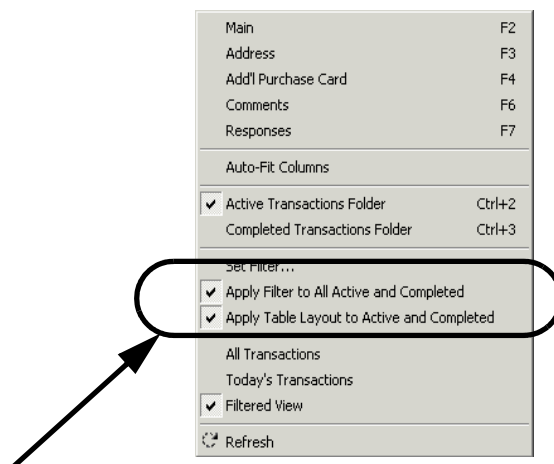
CN!Express remembers how the layout of tables and how they were sorted at the moment when you shut down. When you start CN!Express again, the tables appear with the same layout and sorts.

However, CN!Express turns off any filter that's active when you shut down. The filter still exists, but you have to reapply it after you start up.

Deciding Whether Your Changes Affect Both Tables

When you change the table layout or filter, you can apply your changes to both tables at the same time or just the table you are viewing.

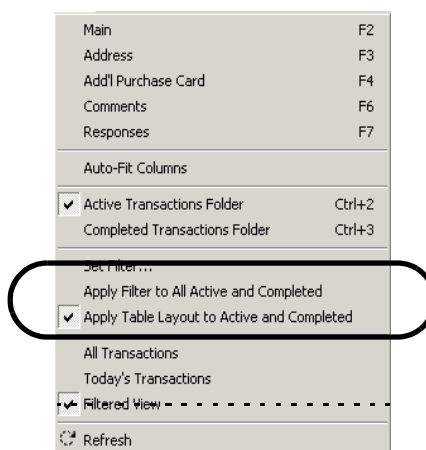
Press **Alt V** (View menu) to view:



Auric Systems International recommends that you leave the check-marks next to Apply Filter and Apply Table Layout.

The menu above shows the default: there's a *check-mark* next to Apply Filter and another check-mark next to Apply Table Layout. So by default, any change you make applies to *both tables*.

The menu below shows *no check-mark* next to Apply Filter. So any filter you turn on applies *only to the table you're viewing* when you actually turn the filter on. However, Apply Table Layout still has a check-mark. If you change the table layout, both tables change.



You can remove or add check-marks as follows:

1. Press **Alt V** (View menu).
2. If you want to change the way the filter works, press **I**.

If you want to change the way the table layout works, press **Y**.

A check-mark means that whatever change you make next (change the filter/change the table layout) applies to both tables. No check-mark means that whatever change you make next applies only to the table you're viewing at that time.

Adding, Removing and Re-ordering Columns on the Tables

You can change the table layout by adding, removing and changing the order of columns on the Active Transactions table and on the Completed Transactions table. (You decide whether your changes apply to both tables or only the table you're viewing.) Every field on every data entry card can become a column on the tables. When you first install *CN!Express*, the tables are already set up to show eight columns:

- Flag
- Account
- Amount
- Action
- Status
- Auth Code
- Result Code
- Response Text

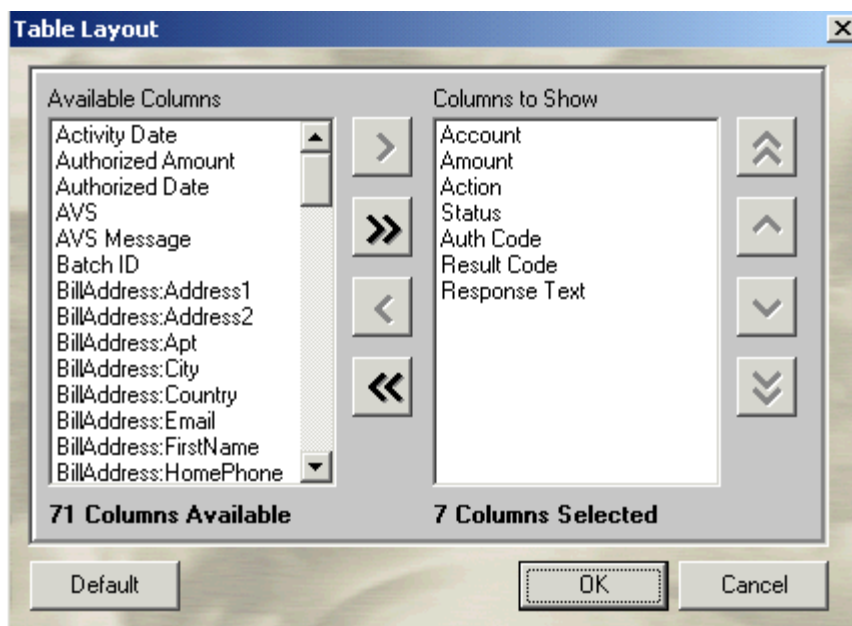
These are the default columns. You might want to add columns to see additional information about transactions (for example, the billing addresses or the types of credit cards used).

To add, remove or change the order of columns on the tables:

1. Press **Alt C** (Configure menu).





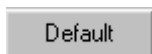
2. Press **L** (Table Layout) to view:

The Flag column doesn't appear on the Table Layout screen; you can't hide or move the Flag column.







3. The two boxes on the screen list Available Columns (columns that are currently hidden from view) and Columns to Show (columns that appear on the tables).

To move a column from one box to the other, click on the column name. Then:

Click on . . .	To Move . . .
	The selected column into the Columns to Show box
	All the columns into the Columns to Show box
	The selected column into the Available Columns box
	All the columns into the Available Columns box
	Return all columns to their default position (with seven columns listed in the Columns to Show box)

4. The first column shown in the Columns to Show box is the first column to appear on the tables (right after the flag). To change a column's position, click on the column you want to move. Then:

Click on . . .	To Move a Column . . .
	To the top of the table (the first position on the screen, next to the flag)
	Up one spot
	Down one spot
	To the bottom of the table (the last position on the screen, farthest from the flag)

5. Press **Enter** to save your changes.

CN!Express shows the tables with the columns you chose at Step 2 and in the order you chose at Step 3.

Even if you shut down CN!Express, the table layout remains the way you left it.

Sorting the Tables

You can sort the Active Transactions and Completed Transactions tables in ascending or descending order for any one displayed column including the account number (Account). You sort each table separately; if you sort the Active Transactions table, you won't automatically sort the Completed Transactions table.






If you sort on the Flag column, ascending order places all flagged transactions last; descending order places all flagged transactions first.

To sort a column:

You can only sort on one column at a time.

1. Click on the column title. An arrow appears to show how the transactions are sorted:

- In ascending order (smallest value to largest)

Active Transactions		Completed Transactions		
	Account	Amount 	Action	Status
	1008	\$75.00	Sale	Entered
	1007	\$90.00	Sale	Entered
	1007	\$100.00	Void	Failed
	3574	\$200.00	Sale	Entered
	5040	\$930.50	Sale	Entered

- In descending order (largest value to smallest)

Active Transactions		Completed Transactions		
	Account	Amount 	Action	Status
	5040	\$930.50	Sale	Entered
	3574	\$200.00	Sale	Entered
	1007	\$100.00	Void	Failed
	1007	\$90.00	Sale	Entered

2. Click on the column title to switch back and forth between ascending and descending order.

Filtering the Tables

A filter lets you view some of the transactions in the tables while it hides the rest (for example, you might want to see only today's transactions or only transactions under \$100). You decide whether the filter applies to both tables or only the table you're viewing.

CN!Express provides one standard filter, and lets you create any custom filter.

Standard Filter

To view only today's transactions:

1. Press **Alt V** (View menu).
2. Press **T** (Today's Transactions)

Your First Custom Filter

For detailed information on how custom filters work, see "Appendix A. Advanced Filtering Techniques" on page 177.

The following sections describe how to define, apply, turn off, re-start and change a basic custom filter.

Suppose you want to view active transactions under \$100 only. Normally, your Active Transactions table shows all active transactions, even those over \$100:

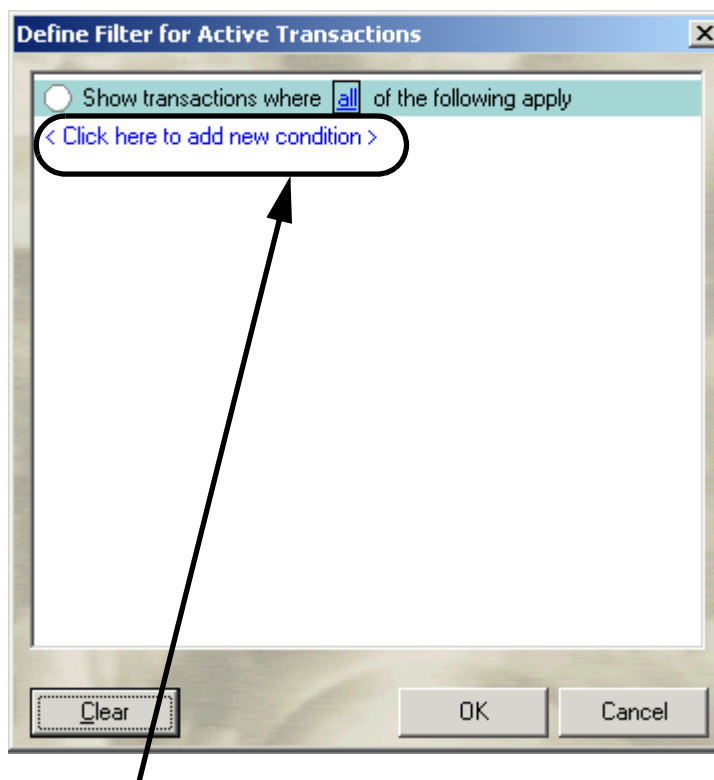
Active Transactions		Completed Transactions				
	Account	Amount	Action	Status	Auth Code	Result Code
	3850	\$250.00	Sale	Entered		0
	6011	\$10.00	Sale	Entered		0
	4050	\$40.00	Sale	Entered		0
	3710	\$80.00	Sale	Entered		0
	5151	\$200.00	Refund/Credit	Entered		0
	3890	\$25.00	Void	Entered		0

May 12 All active transactions. 6

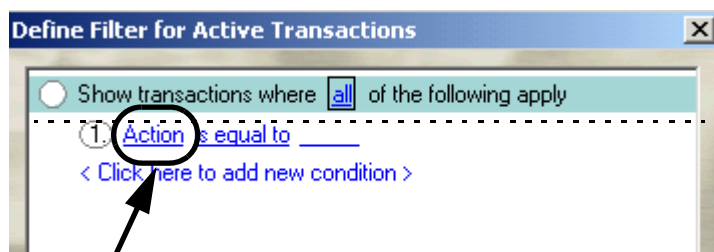
CN!Express lets you store only one custom filter. Every time you define a new filter, you replace the old filter.

To create a custom filter that shows only transactions under \$100:

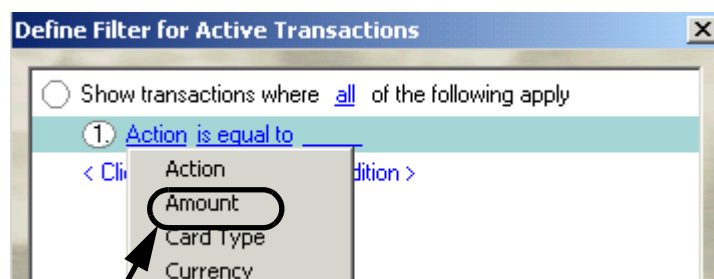
1. Press **Alt V** (View menu).
2. Press **E** (Set Filter) to view:



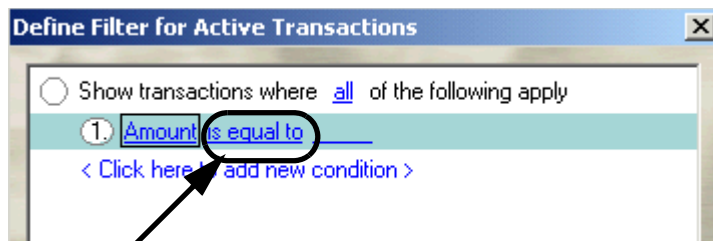
3. Click on Click here to add new condition to view:



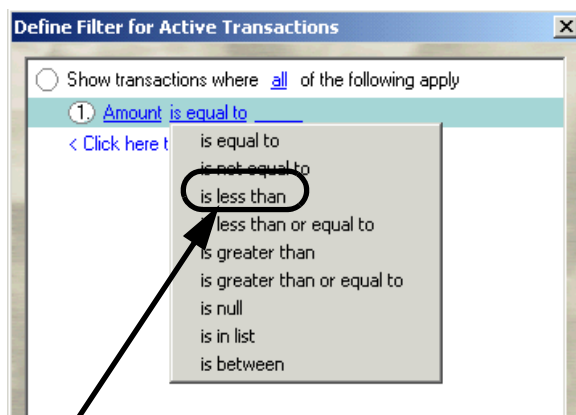
4. Click on Action to view:



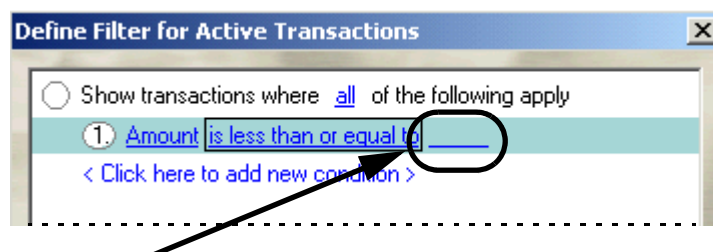
5. Click on Amount to view:



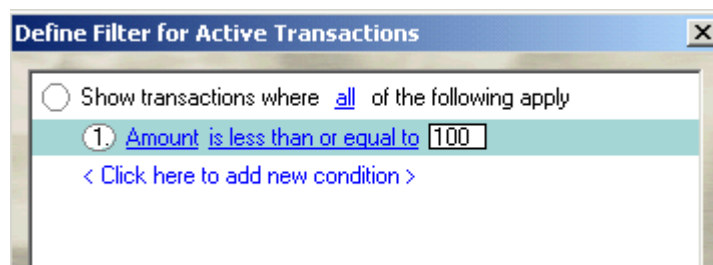
6. Click on is equal to to view:

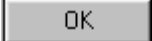






7. Click on is less than to view:



8. Click on _____ and type **100** in the box that appears:



9. Click on  to view only transactions less than \$100:

Active Transactions		Completed Transactions				
	Account	Amount	Action	Status	Auth Code	Result Code
	6011	\$10.00	Sale	Entered		0
	4050	\$40.00	Sale	Entered		0
	3710	\$80.00	Sale	Entered		0
	3890	\$25.00	Void	Entered		0

Active transactions where any of the following apply: Amount is less than 100. 4

Refreshing the Filter

Let's say you've set up and applied your filter showing all transactions less than \$100. You begin to add new transactions, including several transactions that are greater than \$100. Those transactions appear on the Active Transactions table even though the filter is on.

To apply the filter to the new transactions:

1. Press **Alt V** (View menu).
2. Press **S** (Refresh).

Refresh re-applies the filter, hiding all transactions over \$100, even the new ones.

Turning Off and Re-starting a Filter

You also turn off a filter when you shut down CN!Express. However, the filter isn't deleted. After you re-start CN!Express, you can restart the filter.

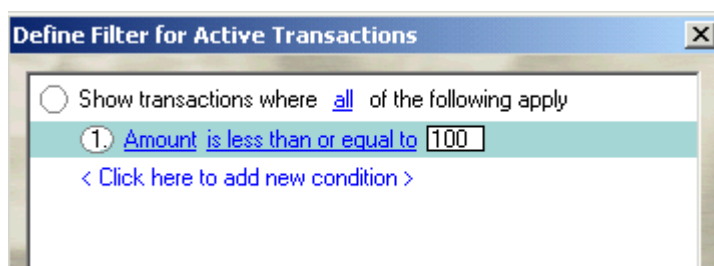
To turn off a filter and show all the transactions, press **Alt V**, then **N** (All Transactions).

To re-start the filter, press **Alt V**, then **F** (Filtered View).

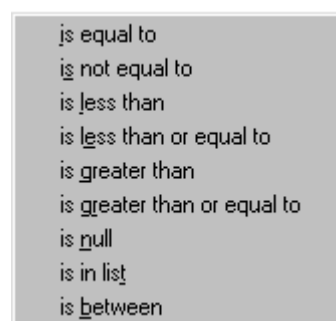
Changing a Filter

To change the filter (to show all transactions between and including \$50 and \$100):

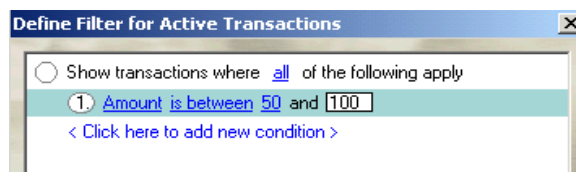
1. Press **Alt V** (View menu).
2. Press **E** (Set Filter) to view:



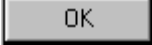
3. Click on is less than to view:

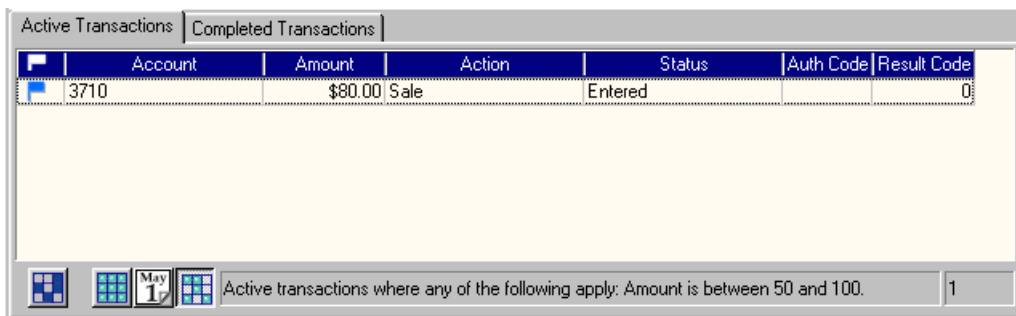


4. Choose is between.
5. Click on **100** type **50** in the box.
6. Click on the second **_____** and type **100** in the box. Your filter should look like this:



When you OK the new filter, the old filter is replaced. If you need the old filter, you have to build it again.

- Click on  to view all transactions between and including \$50 and \$100:



Account	Amount	Action	Status	Auth Code	Result Code
3710	\$80.00	Sale	Entered		0

Active transactions where any of the following apply: Amount is between 50 and 100. 1

Deleting a Custom Filter

To delete a custom filter:

You can't delete a filter just by shutting down CN!Express. The filter is turned off, but you can re-start it after you re-start CN!Express.

- Press **Alt V** (View menu).
- Press **E** (Set Filter).
- Press **C** (Clear).
- Press **Enter**.

You also replace an old filter automatically whenever you define and **Enter** a new filter.

Chapter 10. Printing Tables, Reports, and Receipts

CN!*Express* lets you print either the Active Transactions table or the Completed Transactions table exactly as it appears on the screen.

CN!*Express* also provides six standard reports. Each report summarizes different information about the transactions currently on view in either the Active Transactions or Completed Transactions tables. For example, one report (transaction action) tells you the total number and total dollar amount of transactions on the table you're viewing, organized by the type of transaction. Two of the reports (Flagged Records and Flagged Records with Currency Breakdown) include all flagged transactions, whether or not they're on view.

Finally, CN!*Express* lets you print receipts for any transaction.

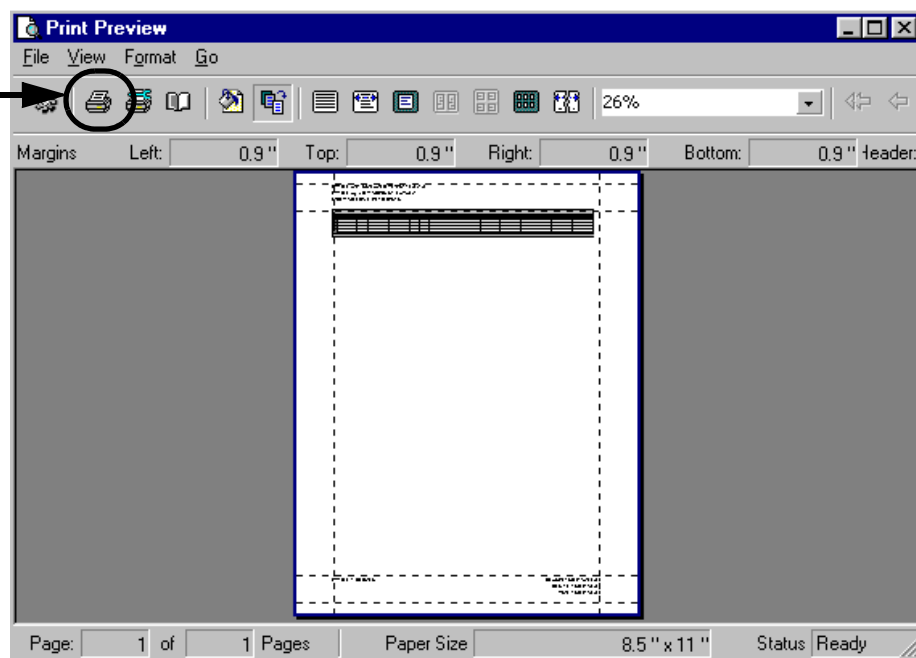
This chapter explains how to print, change the appearance of, and change the content of table printouts and standard reports. It also explains how to print receipts.

Printing the Tables

To print the table you are currently viewing:

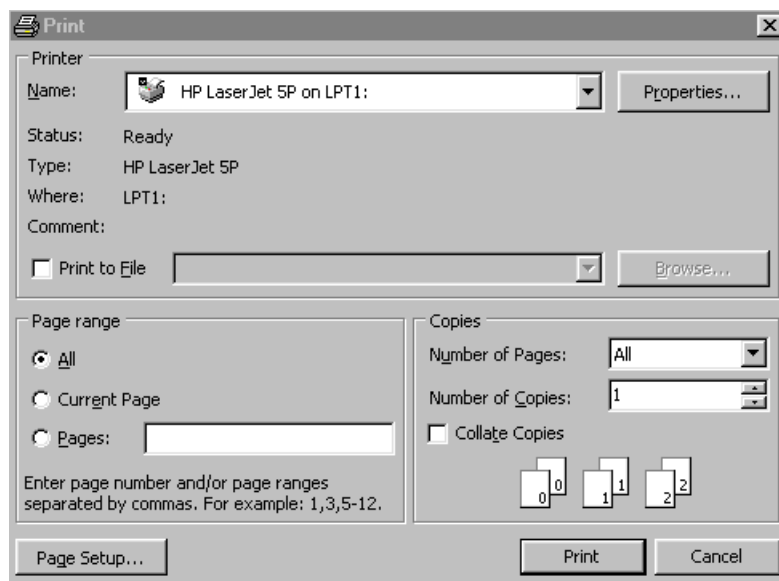
1. Press **Ctrl P** to view a screen like the following:

This is the
print
button.



This screen shows a report that is set up to print on one page. Its orientation (the way the page is facing) is portrait. This is the default.

2. Press **Ctrl P** again to view:



3. Press **Enter** to print.
4. Press **Alt F**, then **C** to exit the Print Preview screen.

If the table you're printing doesn't fit comfortably on the page, two things may happen:

- The table prints in such small type that you can't read it.
- Some of the columns on the table aren't printed at all.

If that's the case, you must change the format of the page so that the table fits better. For example, you can do one or more of the following:

- Change the print setup, so that the orientation of the page is landscape instead of portrait. *CN!Express* can fit more information across a landscape page. See "Changing the Print Setup for Tables and Reports" on page 125.
- Unshrink the page, so that the table is printed across two or more pages.
- Reduce the number of columns in the printout, so that *CN!Express* can print more of the table in larger type.

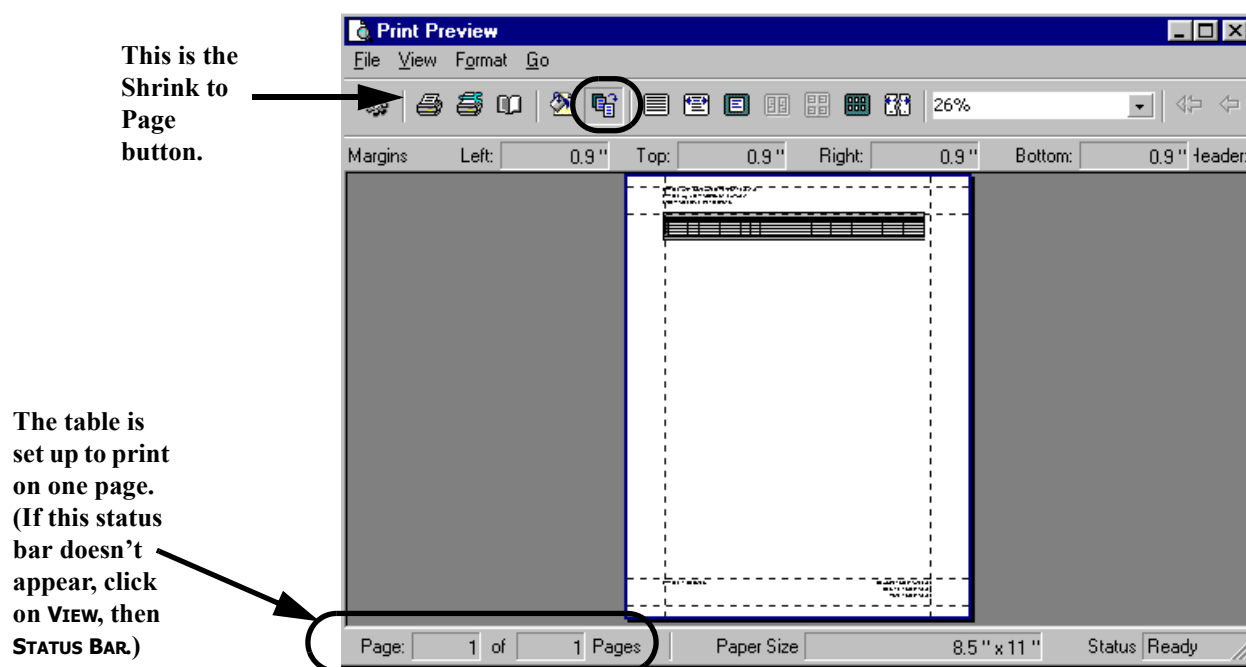
The following sections describe how to unshrink the page and reduce the number of columns in the printout. You can customize a table printout by changing the layout, filtering, and sorting.

Shrinking the Page

When you shrink the page, you're telling *CN!Express* to print all the information on a table on one page. If you unshrink, *CN!Express* prints the information across the width of two or more pages. When your printout is complete, you have to physically place the pages side-by-side to see the full table as it appears on your screen.

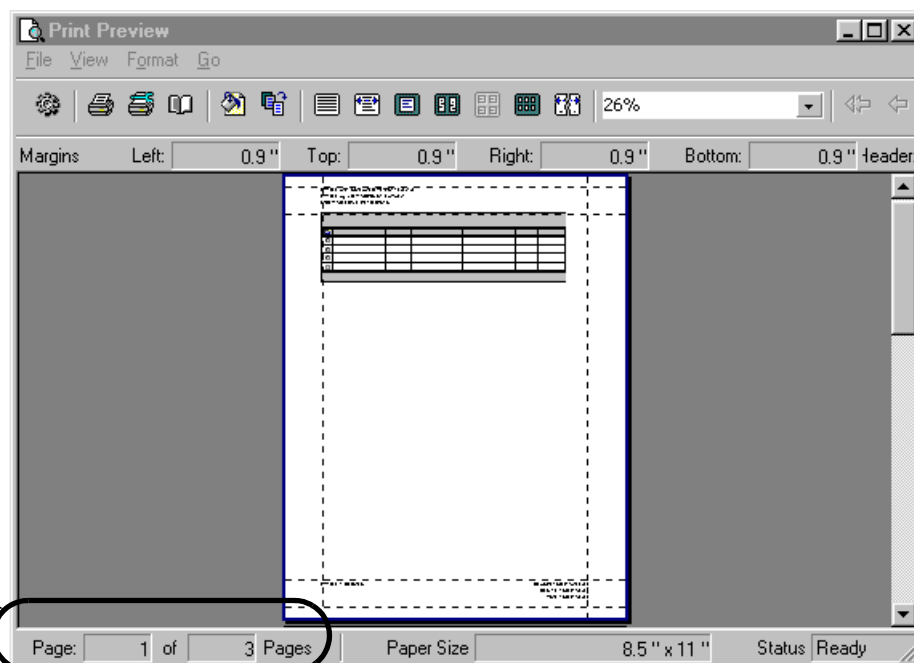
To unshrink the page:

1. Press **Ctrl P** to view a screen like the following:



2. Press  to view:

The table is set up to print across several pages.



The table is now set up to print across three pages (in this case, portrait pages).

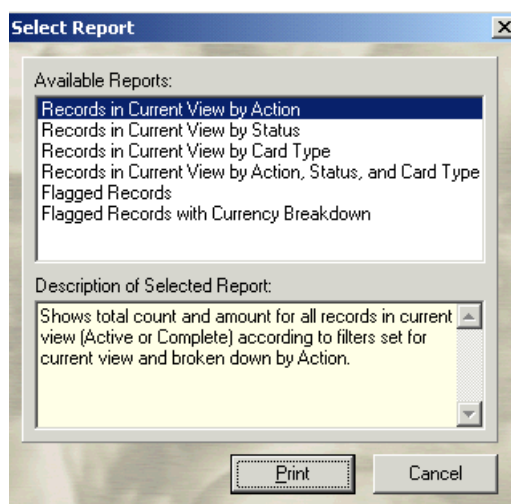
Reducing the Number of Columns in the Printout

When you print a table, you print exactly the information that shows on the screen. If you have problems fitting all that information on the printed page, you can change the table layout to show fewer columns, as described in Chapter 9.

Printing a Standard Summary Report

To print a standard summary report on the table you are currently viewing:

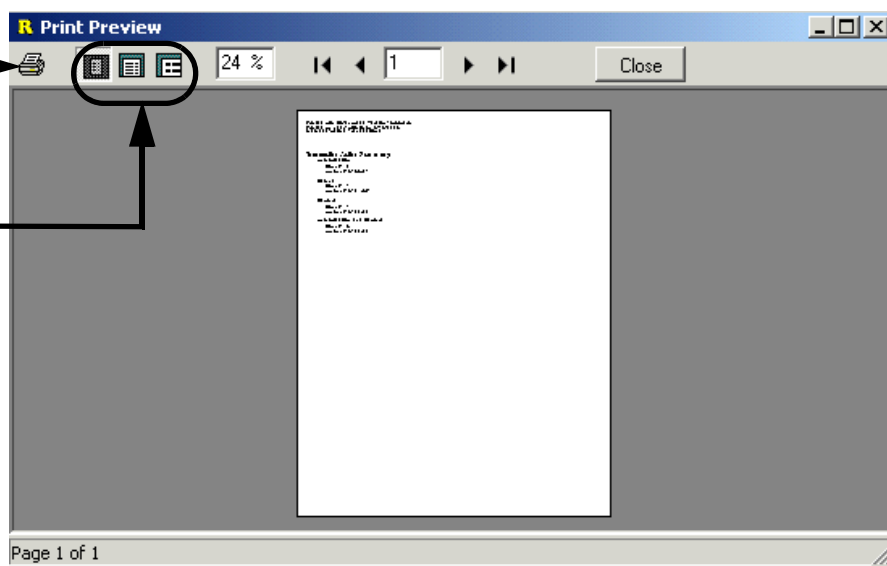
1. Press **Ctrl R** (Reports) to view:



2. Double click on the report you want, to view a screen like the following:

This is the print button.

These buttons let you zoom in and out.



On the following pages are examples of the six types of reports.

Printed with CN!Express Version: 3.38.2.3
Printed by user: ADMIN on 5/15/2003
Includes Active Transactions

Transaction Action Summary		
Authorization	Count	2
	Amount	\$165.01
Refund	Count	1
	Amount	\$124.59
Capture	Count	1
	Amount	\$100.00
Authorization and Capture	Count	3
	Amount	\$100.00

Records in Current View by Action

Printed with CN!Express Version: 3.38.2.3
Printed by user: ADMIN on 5/15/2003
Includes Active Transactions

Transaction Status Summary		
Authorized	Count	1
	Amount	\$100.00
Entered	Count	6
	Amount	\$389.60

Records in Current View by Status

Printed with CN!Express Version: 3.38.2.3
Printed by user: ADMIN on 5/15/2003
Includes Active Transactions

Card Type Summary		
Visa	Count	2
	Entered Total	\$80.01
MC	Count	2
	Entered Total	\$100.00
AMEX	Count	3
	Entered Total	\$199.59

Records in Current View
by Card Type

Printed with CN!Express Version: 3.38.2.3
Printed by user: ADMIN on 5/15/2003
Includes Active Transactions

Current Transactions Summary Report		
Transaction Action Summary		
Authorization	Count	2
	Amount	\$165.01
Refund	Count	1
	Amount	\$124.59
Capture	Count	1
	Amount	\$100.00
Authorization and Capture	Count	3
	Amount	\$100.00
Transaction Status Summary		
Authorized	Count	1
	Amount	\$100.00
Entered	Count	6
	Amount	\$389.60
Card Type Summary		
Visa	Count	2
	Entered Total	\$80.01

Records in Current View by Action, Status,
and Card Type


Printed with CNExpress Version: 3.38.2.13 Printed by user: ADMIN on 5/31/2003 Includes Flagged Transactions	
Flagged Transaction Summary	
Total	
Count: 5	
Amount: 402.00	

Flagged Records


Printed with CNExpress Version: 3.38.2.13 Printed by user: ADMIN on 5/31/2003 Includes Flagged Transactions	
Flagged Transaction Summary	
Canadian Dollars	
Count: 1	
Amount: \$125.00	
Sri Lanka Rupees	
Count: 1	
Amount: 125.00	
US Dollars	
Count: 3	
Amount: \$152.00	
Total	
Count: 5	
Amount: 402.00	

Flagged Records with Currency Breakdown

(Both of these reports include *all* flagged transactions, even if they are not on view; that is, the reports include flagged transactions that are filtered out.)

3. Click on 

4. Press **Enter** to print the report.

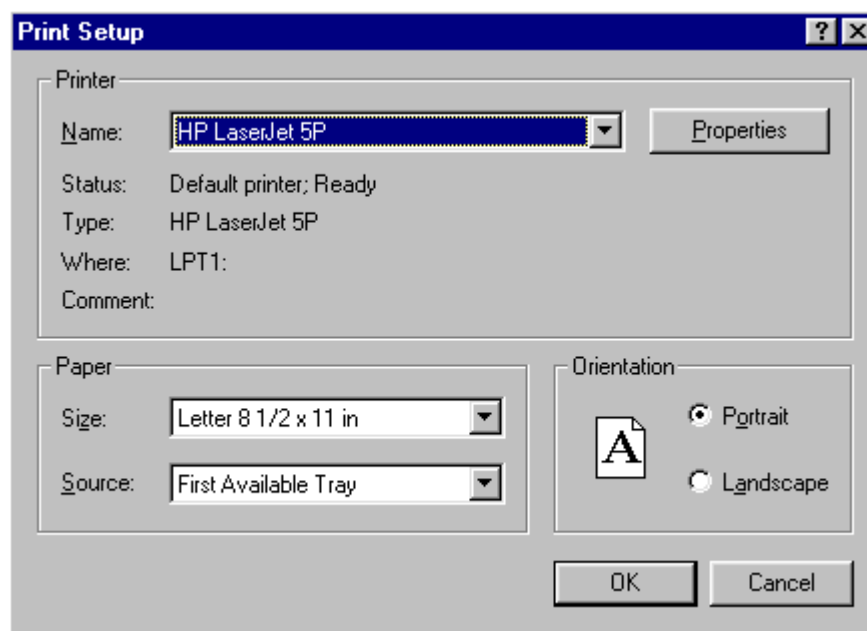
5. Click on  to exit the Print Preview screen.

You can change the orientation of a report (portrait or landscape) by changing the print setup. You can customize a report by using filters.

Changing the Print Setup for Tables and Reports

You can print tables and reports in either portrait or landscape (sideways). The default is portrait. To change the orientation of a report to landscape:

1. Press **Alt F**, then **S** to view:



2. Click on the Landscape radio button to change the orientation of the page to landscape.
3. Press **Enter**.

From now on, every table printout and standard report is printed in landscape, until you change the print setup or shut down CN!Express.

Customizing Table Printouts and Standard Reports

The Flagged Records report and the Flagged Records with Currency Breakdown report always show *all* flagged transactions, even if they're not on view. You can't customize them by changing the table's layout or filter, only by adding or removing flags.

Every table printout and most standard summary reports are based on the transactions currently on view in the Active Transactions or Completed Transactions table. So if you want to customize a printout or report, you have to change the transactions that are on view, as explained in Chapter 9.

You can customize table printouts by changing the table's layout, filter, and sort. Standard summary reports aren't affected by changes in layout and sorts, but you can customize them by applying a filter.

Here's an example. Let's say you start with this table:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Response
	6102	\$50.00	Sale	Entered			
	8044	\$250.00	Sale	Entered			
	5040	\$75.00	Refund/Credit	Entered			
	2624	\$100.00	Sale	Entered			
	3574	\$20.00	Refund/Credit	Entered			




May 1 All active transactions. 5





You request the standard report called Records in Current View by Action, Status, and Card Type. Here's the report that CN!Express prints out:

Printed with CN!Express Version: 3.0.5.4 Printed by user: ADMIN on 2/3/02 Includes Active Transactions	
Current Transactions Summary Report	
Transaction Type Summary	
Credit	Count: 2 Amount: \$95.00
Sale	Count: 3 Amount: \$400.00
Transaction Status Summary	
Entered	Count: 5 Amount: \$495.00
Card Type Summary	
Visa	Count: 2 Entered Total: \$175.00
MC	Count: 3 Entered Total: \$320.00

If you apply a filter to the table to show only today's transactions, your table looks like this:

Active Transactions | Completed Transactions

	Account	Amount	Action	Status	Auth Code	Result Code	Response
	6102	\$50.00	Sale	Entered			
	8044	\$250.00	Sale	Entered			
	2624	\$100.00	Sale	Entered			

Active transactions where all of the following apply: Action is equal to Sale.


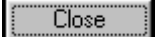
3

If you request the same standard report (Records in Current View by Action, Status, and Card Type), it now looks like this:

Only the transactions currently on view are included in the report.

Printed with CN!Express Version: 3.0.5.4 Printed by user: ADMIN on 2/3/02 Includes Active Transactions	
Current Transactions Summary Report	
Transaction Type Summary	
Sale	Count: 3 Amount: \$400.00
Transaction Status Summary	
Entered	Count: 3 Amount: \$400.00
Card Type Summary	
Visa	Count: 1 Entered Total: \$100.00
MC	Count: 2 Entered Total: \$300.00

The following steps explain how to use the CN!Express standard filter to create and print a report that includes only today's transactions.

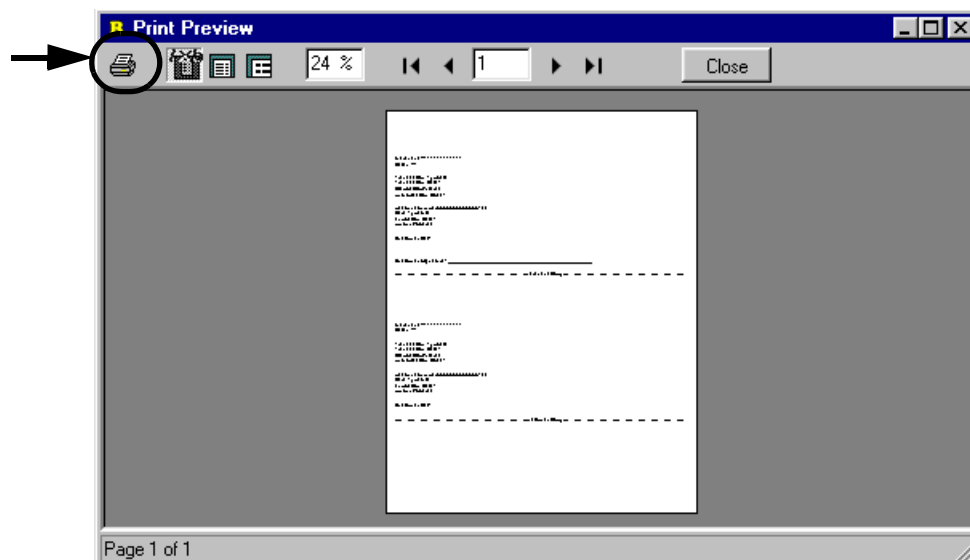
1. Press **Alt V** (View menu), then **T** (Today's Transactions)
2. Press **Ctrl R** (Reports).
3. Choose the type of report you want.
4. Press **Alt P** (Print).
5. Click on , then press **Enter**.
6. Click on  to exit the Print Preview screen.

Printing a Receipt

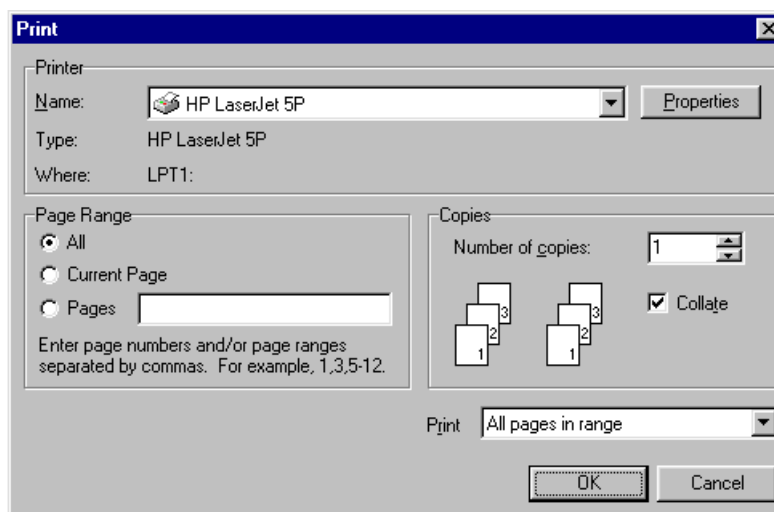
You can print a receipt for any transaction.

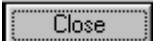
1. Click on the transaction.
2. Press **Alt T** (Transaction menu).
3. Press **P** (Print Receipt) to view:

This is the
print
button.



4. Press  to view:



5. Press **Enter** to print the receipt.
6. Click on  to exit the Print Preview screen.

A typical receipt contains two sections, one for the merchant and one for the customer. Each section contains the same information. For example:

Merchant #:	111111111111
Batch #:	
Transaction Type:	Sale
Transaction Date:	
Disposition:	Entered
Authorization Code:	
Account Number:	XXXXXXXXXXXX6102
Card Type:	MC
Amount:	\$50.00
Customer Ref:	
Customer Signature:	_____

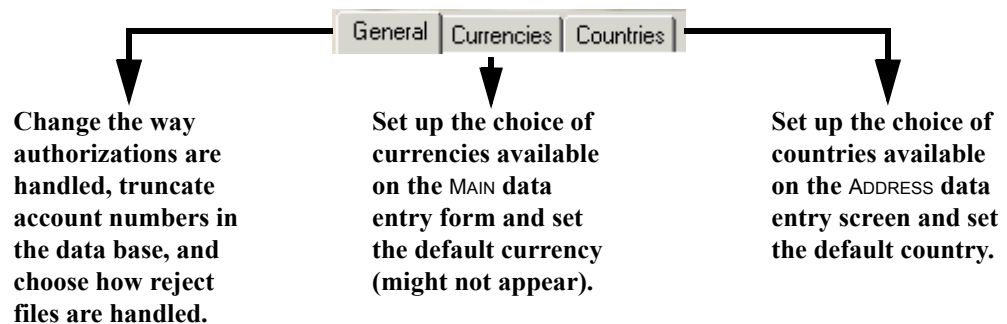
You can't change the orientation of receipts (they're always portrait). However, you can change their content if you're an ADMIN user. For more information, see "Changing Receipt Settings" on page 138.

Chapter 11. Customizing Your System Settings

If you're an ADMIN user, you can customize:

- The way CN!*Express* handles authorizations
- Some of the information that appears on the data entry forms
- The content of receipts.

Click on the Configure menu, then click on System Settings to view the following tab, where you can handle most of these tasks:

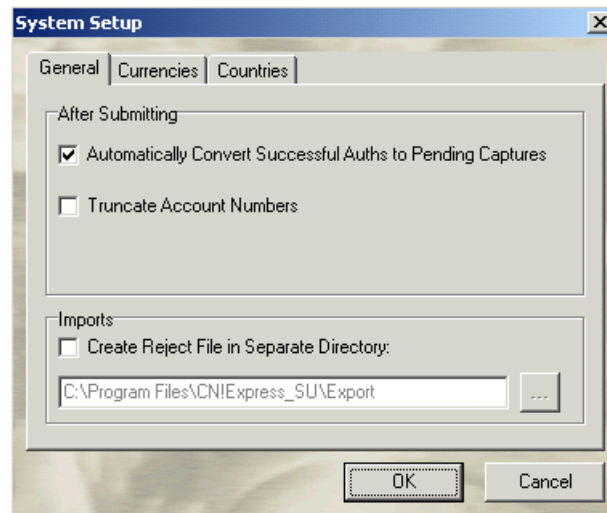


This chapter explains how to set your options under each tab. It also explains how to change receipt settings.

Changing the General Options

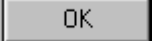
The general options control how captures are created (automatically or manually), whether account numbers are truncated in the data base, and the location of the reject file.

1. Press **Alt C** (Configure menu).
2. Press **Y** (System Settings) to view:



3. If necessary, click on the General tab.
Typical default settings under the General tab are shown above; there's only one check-mark, next to Automatically Convert Successful Auths to Pending Captures.
4. You may change any of the settings, as explained in the following table.

<i>Option . . .</i>	<i>With a Check-Mark . . .</i>	<i>Without a Check-Mark . . .</i>
Automatically Update Successful Auths	<input checked="" type="checkbox"/> When you send a sales transaction to your processing service for authorization and the processing service authorizes it, then CN!Express automatically converts the successful authorization to a pending deposit (delayed capture).	<input type="checkbox"/> CN!Express processes authorizations but doesn't automatically create a delayed capture transaction (pending deposit). You must manually change the authorization to a delayed capture.
Truncate Account Numbers	<input checked="" type="checkbox"/> From now on, CN!Express truncates (shortens) account numbers in the data base after processing is completed. You cannot recover the full account numbers. (If you select this option, (a) export files always contain truncated account numbers regardless of how you set up exports; and (b) you won't be able to create refunds using the COMPLETED TRANSACTIONS table.)	<input type="checkbox"/> CN!Express does not truncate account numbers in the data base. (They are still truncated on the ACTIVE TRANSACTIONS and COMPLETED TRANSACTIONS tables.)
Create Reject File in Separate Directory	<input checked="" type="checkbox"/> You select the directory where you want the reject file(s) stored.	<input type="checkbox"/> Reject file(s) remain in EXPORT directory

5. Click on  to save your change.

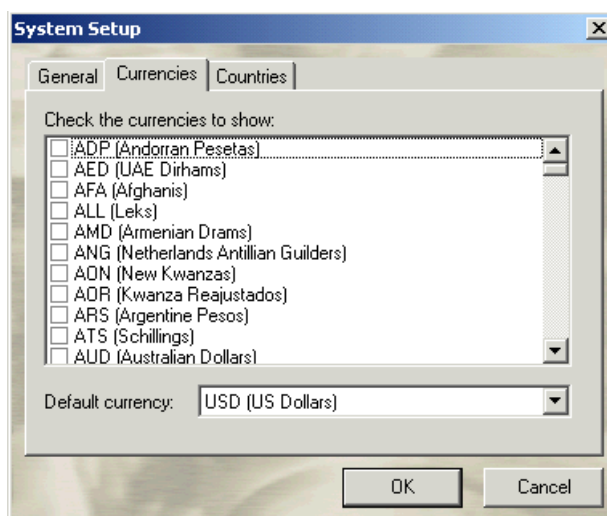
Setting Up Currencies

Your processing service may accept only a few of the currencies available and require special setup arrangements. Ask your processing service about their options and requirements.

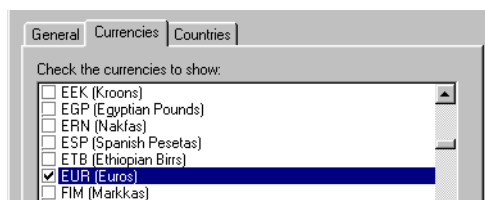
On the Main data entry form, you might have a box that lets you choose the type of currency being used for the transaction. This box appears only if your processing service accepts multiple currencies. If your processing service only accepts U.S. dollars, CN!Express hides the Currency box and also hides the Currencies tab under Preferences.

To change the choices available in the currency box or to change the default currency:

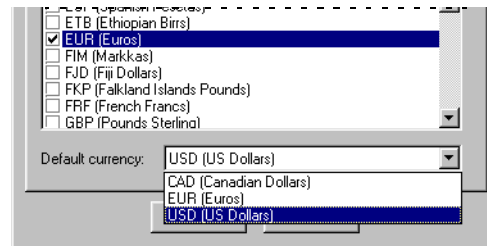
1. Press **Alt C** (Configure menu).
2. Press **Y** (System Settings).
3. Click on the Currencies tab to view:




4. Use the scroll bar to scroll through the currencies available. Click on the box next to a currency to add or remove a check-mark:
 - If you want a type of currency to be a choice on the Main data entry form, make sure it's check-marked. If necessary, click on the box to add a check-mark. For example:



- If you don't want a type of currency to be a choice on the Main data entry form, make sure it isn't check-marked. If necessary, click on the box to remove the check-mark.
5. Click on the Default Currency box to view a list of all currencies that have check-marks. For example:

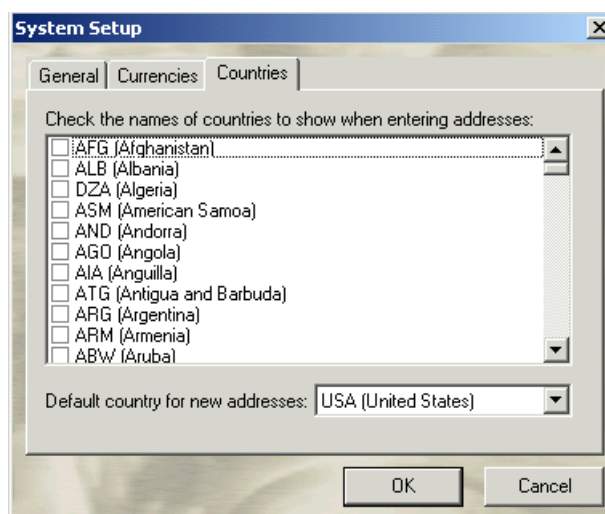


6. Click on one currency. Every time you start a new transaction, this currency will automatically appear in the Currency box on the Main data entry form. This is the default.
7. Click on  to save your changes.

Setting Up Countries

On the Address data entry form, you have a box that lets you choose from a list of countries for billing or shipping addresses. To change the list or change the default country:

1. Press **Alt C** (Configure menu).
2. Press **Y** (System Settings).
3. Click on the **Countries** tab to view:



You must enter the correct country for purchase cards, so make sure you check-mark every country where you expect purchase card transactions.


4. Use the scroll bar to view the countries available. Click on the box next to a country to add or remove a check-mark:
- If you want a country to be a choice on the Address data entry form, make sure it's check-marked. If necessary, click on the box to add a check-mark. For example:



- If you don't want a country to be a choice on the Address data entry form, make sure it isn't check-marked. If necessary, click on the box to remove the check-mark.

- Click on the Default Country box to view a list of all countries that have check-marks. For example:

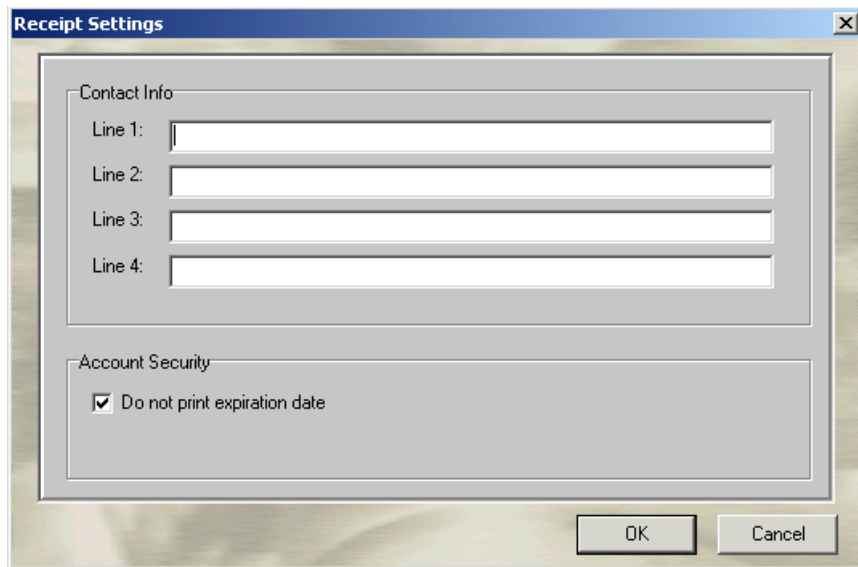


- Click on one country. Every time you start a new transaction, this country will automatically appear in the Country box on the Address data entry form. This is the default.
- Click on  to save your changes.

Changing Receipt Settings

To change some of the content on your receipts:

1. Press **Alt C** (Configure menu).
2. Press **R** (Receipt Settings) to view:



3. You can type any information you like in each of the Line boxes. For this example, assume the information typed in is an address: Any Corporation, 111 Any Street, Anyplace, NH.
4. If you remove the check-mark next to Do not print expiration date, the expiration date is printed on the receipt. Auric Systems International recommends that you keep the check-mark. For this example, assume the check-mark remains.
5. Press **Enter**.

From now on, when you print a receipt, the information you typed in the Line boxes appears:

**Any Corporation
111 Any Street
Anywhere, NH**

Merchant #: 111111111111
Batch #:

Transaction Type: Sale
Transaction Date:
Disposition: Entered
Authorization Code:

Account Number: XXXXXXXXXXXX6102
Card Type: MC

Amount: \$50.00

Customer Ref:

Customer Signature: _____

Chapter 12.

Working with Batches

This chapter describes how to close batches manually and view the batch history. If your processing service doesn't support these capabilities, you won't be able to use them in *CN!Express*.

Closing Batches

Most processing services offer a regular automatic schedule for closing out batches (groups of transactions). After a batch is closed, completed transactions can't be changed further; for example, you can't void them, even though the closed transactions still appear on your Completed Transactions table.

Some processing services let you close batches manually, whenever you like. You must make arrangements for manual batch closes directly with your processing service.

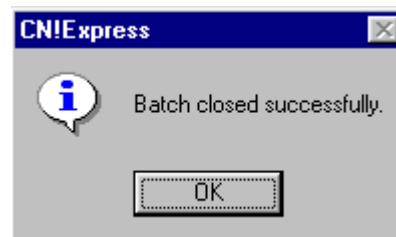
To close a batch manually:

1. Press **Alt T** (Transactions).
2. Press **O** (Close Batch) to view a screen like the following:

You must repeat the manual close batch procedure separately for each division.



3. Press **Enter**.
4. Wait. When the batch is closed, a message like the following appears:



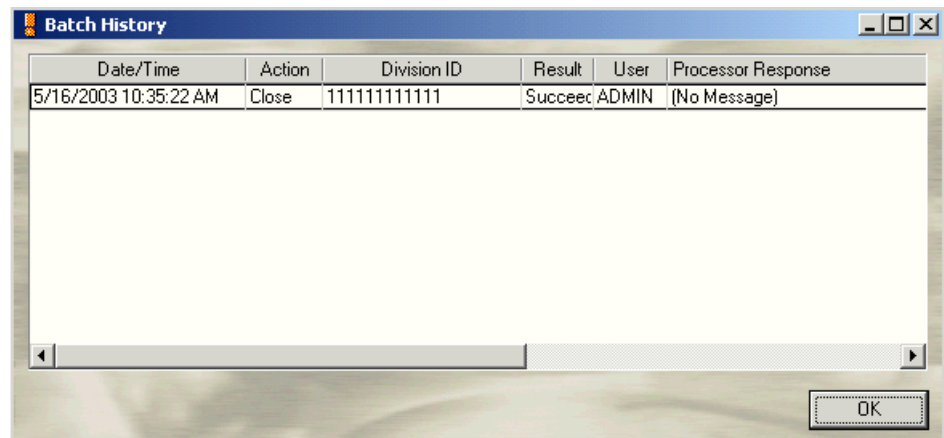
5. Press **Enter**.



Batch History

The batch history is a record of the batches that were closed *manually*. It *doesn't include batches closed automatically* by the processing service.

To view the batch history:

1. Press **Alt T** (Transaction).
2. Press **B** (Batch History) to view:



3. You can sort the information on the batch history screen by clicking on any one of the column headings. (You can only sort on one column at a time.) Each time you click, an arrow appears next to the column name:
 -  means that the column is sorted in ascending order (starting with the smallest value and going up to the largest)
 -  means that the column is sorted in descending order (starting with the largest value and going down to the smallest)
4. When you've finished viewing the batch history, press **Enter** to leave the screen.

Chapter 13.

Importing, Exporting, and Archiving

For information on fields, press **ALT H (Help)**, then **F (Field Reference)**. You may want to view or print this list *before* you begin importing or exporting.

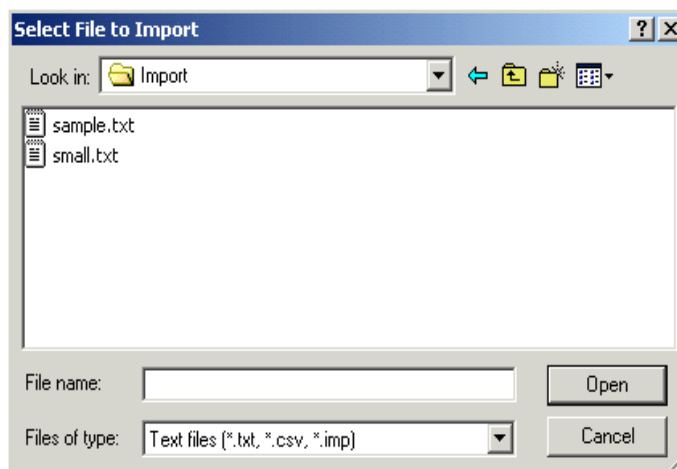
This chapter describes how to import and export files in *CN!Express* and how to archive. You must be an ADMIN user to archive.

Importing Files

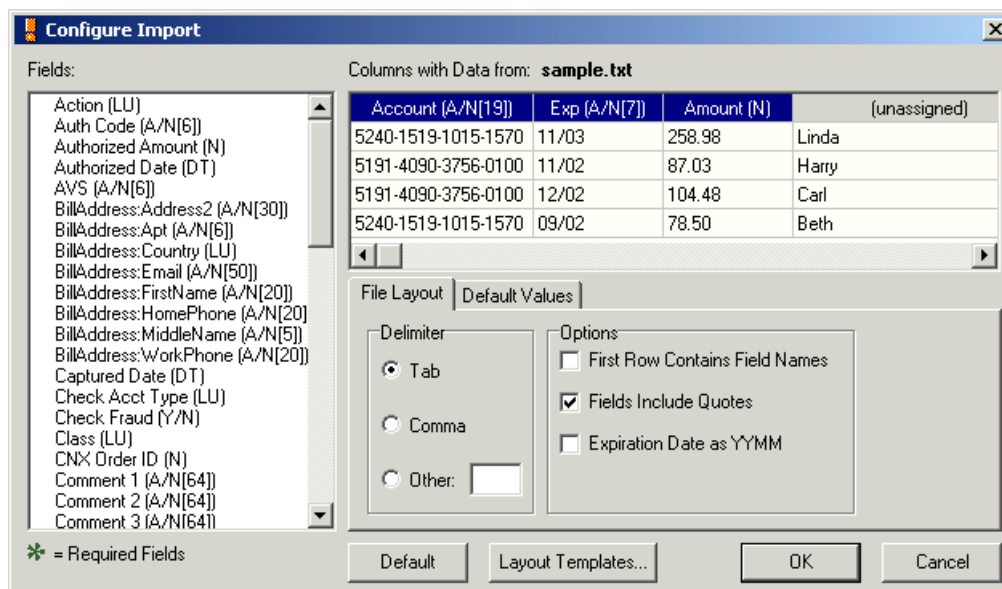
You can export to either a Microsoft Excel file or a text file but you can import only from a text file.

You can import transactions into the Active Transactions table from a text file.

1. Press **Alt F** (File menu).
2. Press **I** (Import) to view:



3. Double click on the name of the file you want to import to view:



In the field list, the abbreviations stand for:

A/N	Alphanumeric
DT	Date
LU	Look-up
N	Number
Y/N	Yes/No or On/Off


CN!Express remembers your choices under the File Layout and Default Values tabs; and keeps them the same for every import, until you change them.

Layout Templates...

is used to access custom import templates, such as the ICV-style files supplied with CN!Express.

Every column you want to import (Columns with Data from:) needs a field title. The Fields list shows the available field titles. Some of the field titles are marked with an asterisk (*). These fields are required and must be assigned to a column; for example, Account (account number), Amount, and Exp (expiration date). Step 4 describes how to assign field titles to columns.

The field title includes information about the type and size of the field. For example, Account (A/N[19]) means that you can enter a maximum of 19 letters or numbers (alphanumeric: A/N) in the account field.

4. If a column title is labeled unassigned, you may assign a field title to it:
 - Either click  to automatically assign field titles.
 - Or click on one of the titles in the Fields list and drag it to the correct unassigned column, to identify the column. Place the field title right on top of the word unassigned.
 - Or leave it unassigned; the information in that column won't import.
5. Two tabs appear on the Configure Import screen: File Layout and Default Values. The following steps describe the choices offered under each tab.
 - If you don't have any changes to the file layout or the default values, go directly to Step 5 on page 149.
 - If you are importing ICVerify® (ICV-style) files, go to "ICVerify® (ICV-Style) Files" on page 150.

File Layout Tab

The following information appears under the File Layout tab:

The screenshot shows a dialog box with two tabs: 'File Layout' and 'Default Values'. The 'File Layout' tab is active. It contains two main sections: 'Delimiter' and 'Options'. In the 'Delimiter' section, there are three radio buttons: 'Tab' (which is selected), 'Comma', and 'Other:'. In the 'Options' section, there are three checkboxes: 'First Row Contains Field Names' (unchecked), 'Fields Include Quotes' (checked), and 'Expiration Date as YYMM' (unchecked).

1. Choose a delimiter. The default delimiter is a tab.
2. If necessary, click on one of the choices under Options:
 - Click on First Row Contains Field Names if the first row in the imported file is a list of field names. CN!Express automatically tries to match and label the information in your file with the field names used in CN!Express. Auric Systems recommends leaving off field names when you prepare text files for import.
 - The check-mark on Fields Include Quotes removes the quotes around fields in your import file. If you remove the check-mark, your data looks like this:

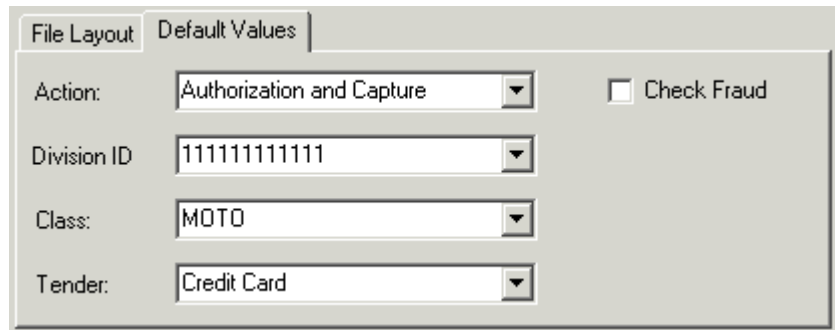
"5240-1519-1015-1570"	"11/03"	"258.98"	"Linda"	"Poole"
"5191-4090-3756-0100"	"11/02"	"87.05"	"Harry"	"Bratton"

You want a clean file, without quotes. So be sure to check-mark this option if the file you're importing has quotes around the data fields.

- Click on Expiration Date as YYMM if the expiration dates in your import file appear with the year first, then the month (that is, November 2003 appears as 03/11). A check-mark in this field alerts CN!Express that the file uses the YYMM format.

Default Values Tab

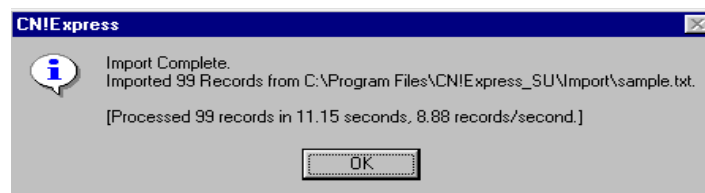
1. Click on the Default Values tab to view:



The screenshot shows a dialog box with two tabs: "File Layout" and "Default Values". The "Default Values" tab is active. It contains four dropdown menus and one checkbox. The "Action" dropdown is set to "Authorization and Capture". The "Division ID" dropdown is set to "111111111111". The "Class" dropdown is set to "MOTO". The "Tender" dropdown is set to "Credit Card". There is an unchecked checkbox labeled "Check Fraud".

2. You may need to change the default Action:
 - If your imported file includes an Action field for each transaction and if the column is labeled Action, leave the default Action as is. CN!Express ignores it and imports the action(s) listed in the Action column.
 - Otherwise, you must set the Default Field to one action (for example, refund/credit) for all imported transactions. All your imported transactions will show that same action when they appear on the Active Transactions table.
3. You may need to change other defaults, such as Division, Class (MOTO, recurring, or E-commerce), and Tender (credit card, purchase card, or check). The choices that appear depend upon your processing service.
4. Click on the Check Fraud box to add a check-mark if you want your processing service to check every imported transaction for fraud.
5. When you've filled out both File Layout and the Default Values the way you want them, press **Enter**.

A message like the following appears:



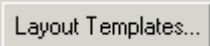
6. Press **Enter**.

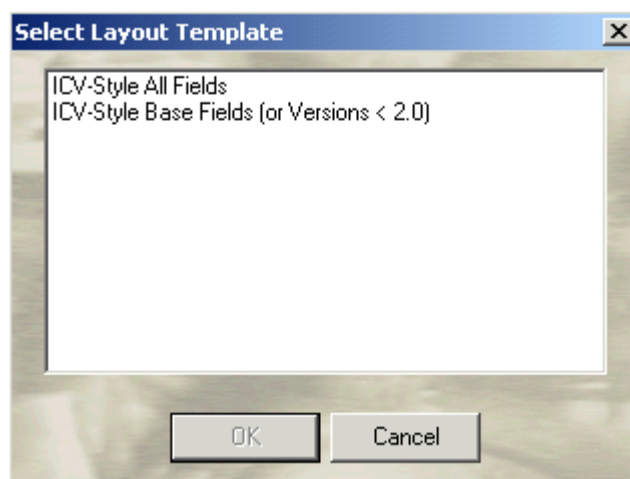
When the import is complete, the transactions appear on your Active Transactions table. Every column that you identified with a field title is imported. If an imported column doesn't appear on the table, you need to change your table layout to show that column.

ICVerify® (ICV-Style) Files

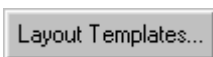
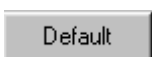
CN!Express is able to import ICV-style files using built-in templates. (The same procedure works with any other custom-made import templates.)

To import ICV-style files, on the Configure Import screen:

1. Click on  to view:

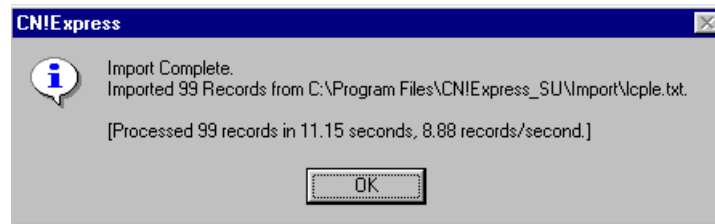


2. Click on the template you prefer.
 3. Press **Enter**.
- CN!Express automatically sets up the defaults for the import file.
4. If necessary, change the defaults as described earlier in this chapter.
- If you make changes, then want to undo them:

- Click on  (*don't click on* ).
- Re-select the template you want.

5. When you're satisfied with the ICV-style layout and when you've filled out both File Layout and the Default Values the way you want them, press **Enter**.

A message like the following appears:



6. Press **Enter**.

When the import is complete, the transactions appear on your Active Transactions table. Every column that you identified with a field title is imported. If an imported column doesn't appear on the table, you need to change your table layout to show that column.

Exporting Transactions

If you want to store completed transactions and remove them from the Completed Transactions table, use the archive procedure, not export.

When you export transactions, they are saved in a text (.txt or .csv) file or Microsoft Excel (.xls) file that you may be able to edit. However, the transactions also remain on the CN!Express Active Transactions or Completed Transactions table.

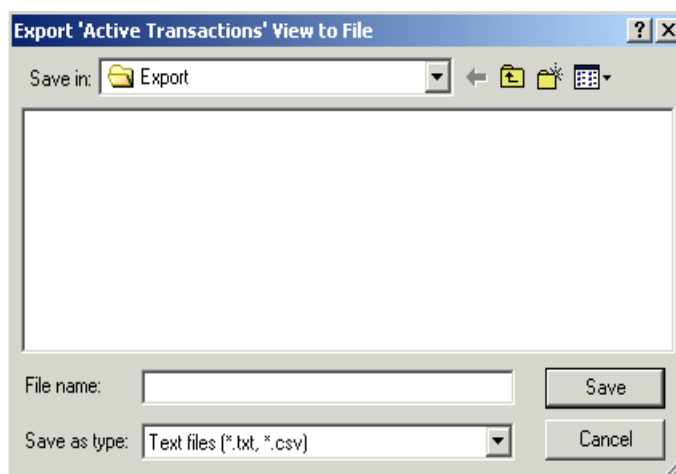
You have two options for exporting transactions to a text file or Microsoft Excel file:

- Using Quick Export
- Using the Export Wizard

Using Quick Export


Quick Export exports the transactions from whichever table you're currently viewing (Active Transactions or Completed Transactions). The current table layout and filter affect the amount of information and the kinds of transactions you export. (For example, if your table layout doesn't include the billing address, the billing address isn't exported. If your filter hides sales transactions, sales transactions aren't exported.)

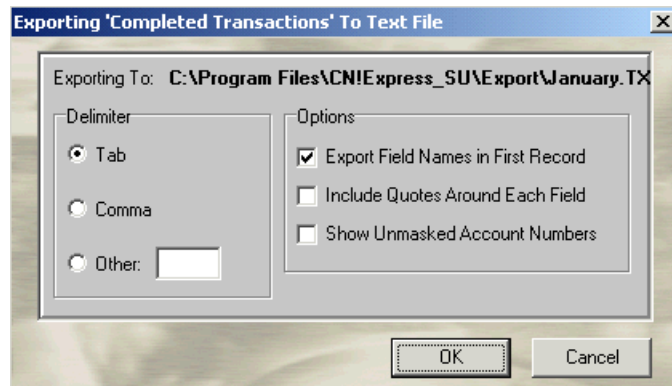
1. Press **Alt F** (File menu).
2. Press **E** (Quick Export) to view:



3. In the File name box, type a unique file name. (For this example, assume the file name is January.)

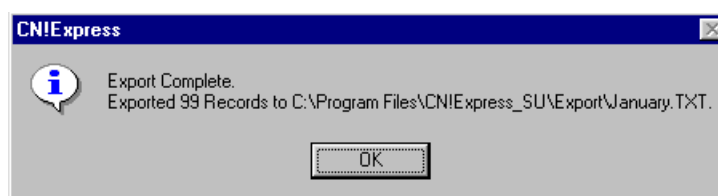
Quick Export isn't case-sensitive so it considers JANUARY, January and januaRy to be the same name.

4. Click on  next to the Save as type box to choose how your transactions should be saved (either in a plain text file or in a Microsoft Excel file).
5. Press **Enter** to view:



6. Click on one radio button under Delimiter. A delimiter divides one item of information from the next in your file. The default delimiter is a Tab between each item for text files and a Comma between each time for Microsoft Excel files.
7. Click on one or more of the Options boxes:
 - Export Field Names in First Record is the default. It is recommended that you leave a check-mark in this box.
 - Include Quotes Around Each Field places quotes around each text field, to make it clearer when a field ends. (This is especially helpful if you chose commas for your delimiter; if a text field contains commas, the quotes prevent confusion about the actual end of the field.)
 - Show Unmasked Account Numbers should remain unchecked. When this box is check-marked the full account number is exported. Auric Systems International strongly recommends that you do not export full account numbers. (If you've changed your system settings to truncate account numbers in the data base, the exported account numbers are automatically truncated whether or not you check-mark this box.)
8. Press **Enter**.

A message like the following appears:



9. Press **Enter**.

All the transactions in the table you're viewing are exported to a text or native Microsoft Excel file.

Using the Export Wizard

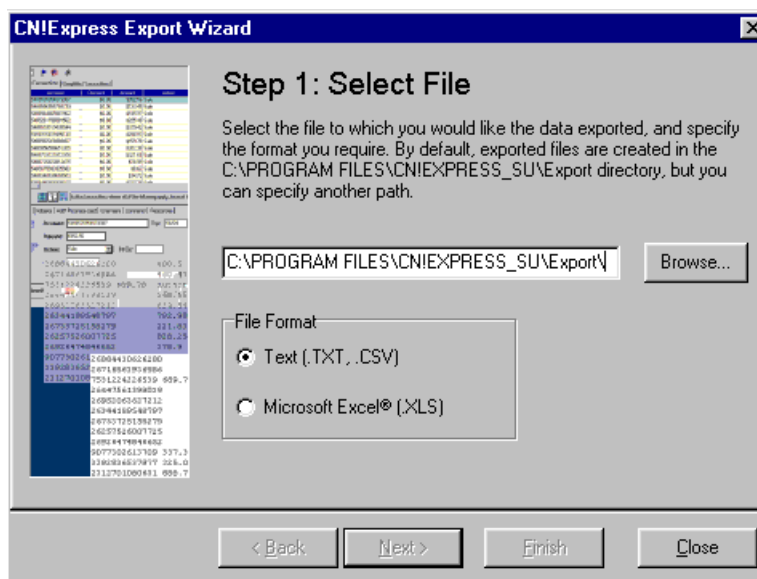
The Export Wizard exports transactions from either the Active Transactions or Completed Transactions table, even if you are not viewing that table. You decide exactly which transactions and which items of information (fields) you want to export. It doesn't matter what layout or filter you're using on the table.

1. Press **Alt F** (File menu).
2. Press **X** (Export Wizard) to view:

After you type a file name, you can click on

Finish

at any time and your files will automatically be exported, in the same way you last set them up.

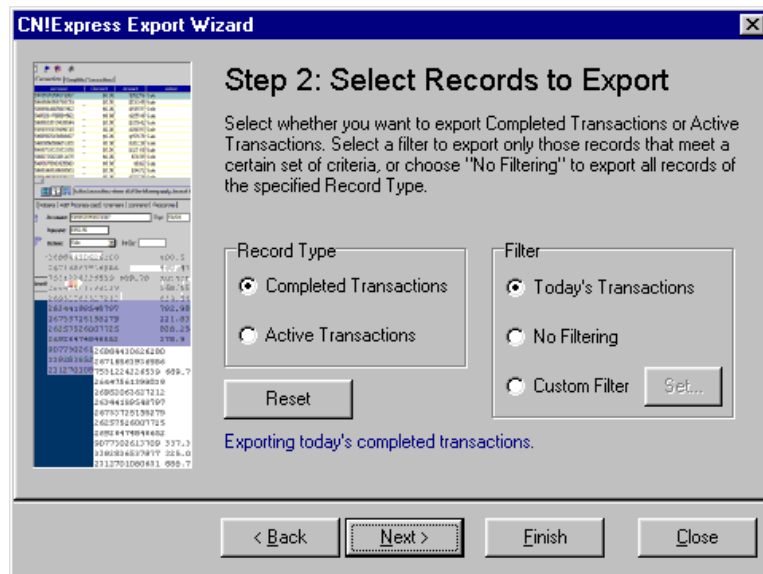


3. Type a unique file name next to the last slash after the file path; for example:

C:\PROGRAM FILES\CN!EXPRESS_SU\EXPORT\JANUARY

The Export Wizard isn't case-sensitive so it considers JANUARY, January and january to be the same name.

4. Click one of the choices under File Format, to choose whether your file is saved in Text or native Microsoft Excel format.
5. Press **Alt N** (Next) to view:



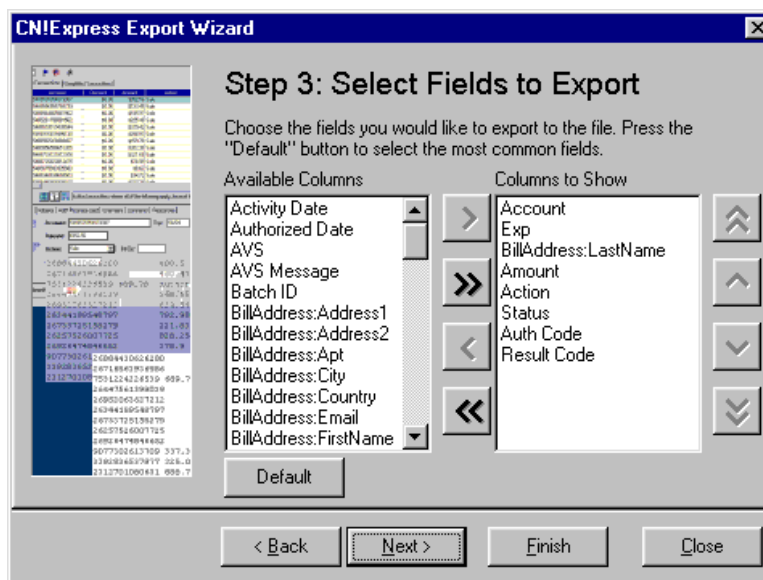
6. Click on one radio button under Record Type:
 - Completed Transactions is the default; it saves your completed transactions to an export file.
 - Active Transactions saves your active transactions to an export file.
7. Click on one of the choices under Filter:
 - Today's Transactions means that only *today's* transactions in the table are exported. Today's transactions are exported even if they aren't visible in the table. This is the default.
 - No Filtering means that *all* the transactions in the table are exported (even the hidden transactions).
 - Custom Filter lets you export only *some* transactions in the table (for example, only Visa transactions or only sales over \$100).

If you want a custom filter, you must build it here even if the transactions table is already filtered.

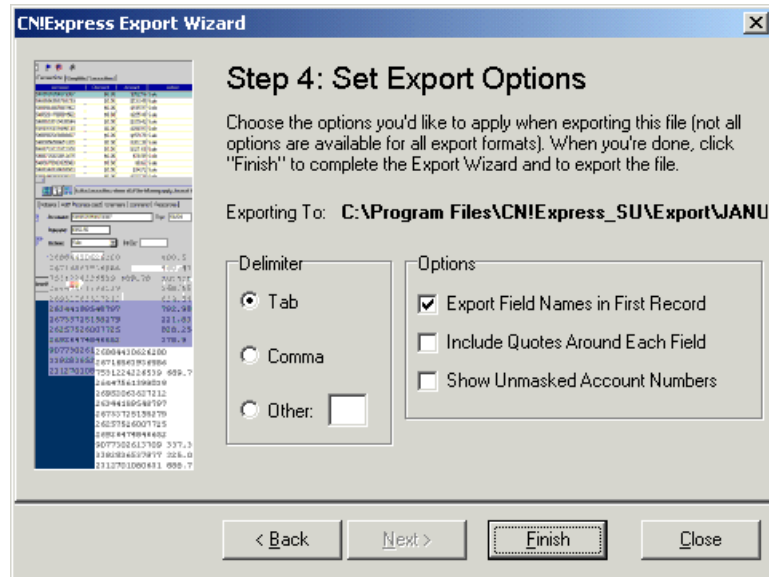
If you select Custom Filter, click on **Set...** to view the Custom Export Filter screen (for information on creating filters, see “Filtering the Tables” on page 110).

8. Click on **Reset** if you change your mind and want to return to the default choices.
9. Press **Alt N** (Next) to view:

The Select Fields screen works exactly like the Table Layout screen; see “Adding, Removing and Re-ordering Columns on the Tables” on page 106.



10. The fields listed in Columns to Show will be exported (the eight default fields are shown above). If you wish to export different information, move fields to and from Available Columns using the arrow keys in the center of the screen. You can also change the order of the columns by using the arrow keys on the right side of the screen.
11. Press **Alt N** (Next) to view:



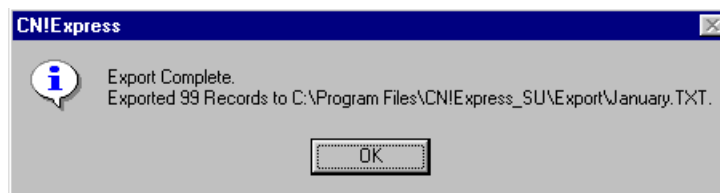
12. Click on one radio button under Delimiter. A delimiter divides one item of information from the next in your file. The default delimiter is a Tab between each item.

13. Click on one or more of the Options boxes:

- Export Field Names in First Record is the default. It is recommended that you leave a check-mark in this box. If you remove the check-mark, no field names appear in the export file.
- Include Quotes Around Each Field places quotes around each text field, to make it clearer when a field ends. (This is especially helpful if you chose commas for your delimiter; if a text field contains commas, the quotes prevent confusion about the actual end of the field.)
- Show Unmasked Account Numbers should remain unchecked. When this box is check-marked the full account number is exported. Auric Systems International strongly recommends that you do not export full account numbers.

14. Press **Alt F** (Finish).

A message like the following appears:



15. Press **Enter**.

All the transactions you specified are exported to a text or Microsoft Excel file.

The Export Wizard remembers your changes.

Re-Using the Export Wizard

Say that the next time you export, you want to use the same setup you specified last time for the Export Wizard:

1. Press **Alt F** (File menu).
2. Press **X** (Export Wizard).
3. Type a file name.
4. Press **Alt F** (Finish).

The transactions are exported in exactly same the way as the last export: from the same table and using the same filter, fields, delimiter, and so on.

Archiving Completed Transactions

You can't archive active transactions. Even if you're viewing the Active Transactions table, you'll only archive completed transactions.

If you want to create a text or Microsoft Excel file without removing completed transactions from CN!Express, use the export procedure, not archive.

When you archive, you first choose a set of transactions that were completed on or before a specific date that you select. Then you send those transactions to a text file for storage. The transactions no longer appear on the Completed Transactions table and are no longer available in CN!Express.

It's a good idea to archive completed transactions on a regular schedule, either weekly or monthly.

You can store archives as long as you like. Before you delete an archive, make sure that you don't need it to comply with Federal, State, or your own company policies.

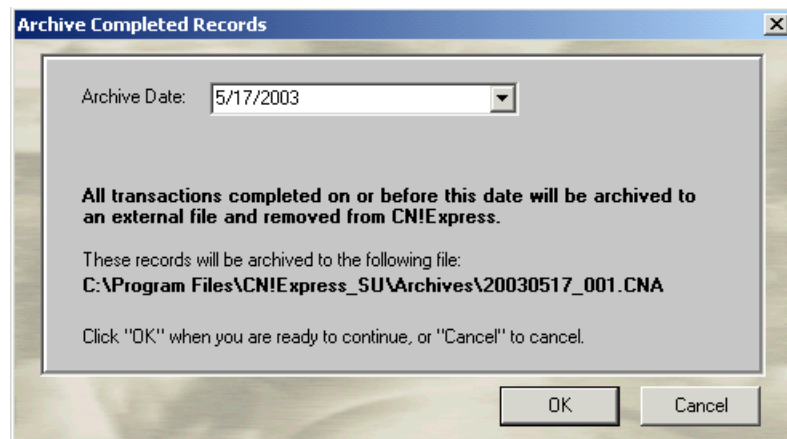
The following sections describe how to archive transactions and how to open archive files. You can read archives with a standard text editor, or you can load them into Microsoft Excel or a database program.

Archiving Transactions

You must be an ADMIN user to archive.


To archive completed transactions:

1. Press **Alt F** (File menu).
2. Press **A** (Archive) to view:



CN!Express automatically fills in the name of the archive file, based on the Archive Date. For example, 20030517.CNA is the file

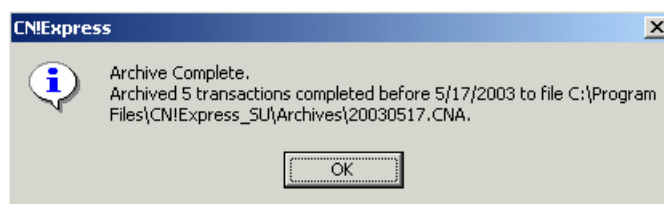
name for the archive that includes files completed on or before 2003, in May (05), and on the 17th day.

3. You must select a cut-off date (Archive Date) for transactions that will be archived. Do one of the following:
 - Either type a date in the Archive Date box.
 - Or click on  to view a calendar and select a date.
 - Or keep the default date, which is 30 days earlier than today's date (for example, if today is December 4, the default date is November 4).

CN!Express archives all transactions that occurred on or before the date you chose.

4. Press **Enter** to start the archive.
5. Wait. After a while, you'll see a message like the following:

If you archive again on the same day, CN!Express adds a consecutive number to the file name; for example, 20030517_001.CNA.



6. Press **Enter**.

Your completed transactions are now archived.

Chapter 14.

Using the On-Screen Buttons

The previous chapters in this manual described how to use keyboard short-cuts for data entry and processing. This chapter describes how to use the on-screen buttons and your mouse to record and send a transaction; flag or unflag a transaction; print a report; and change the contents of a report using a filter.

This chapter doesn't explain everything you can view or do with the buttons. For more information about individual buttons, see "Chapter 5. Understanding the CN!Express Screen" on page 41.

Recording and Saving a Transaction Using Buttons

The following picture shows the basic steps in recording and saving most transactions using the buttons. Your Main data entry form may look different; it shows the exact boxes (fields) that your credit card service expects.

The screenshot displays the 'CN!Express for Paymentech Orbital Gateway - ADMIN' window. It features a menu bar (File, Edit, Transaction, View, Configure, Help) and a toolbar with icons for file operations and a dollar sign. Below the toolbar are two tabs: 'Active Transactions' (selected) and 'Completed Transactions'. A table with columns 'Account', 'Amount', 'Action', 'Status', 'Auth Code', 'Result Code', and 'Response T' is visible. Below the table is a status bar showing 'All active transactions.' and a count of '0'. The main data entry form includes fields for 'Account', 'Exp.', 'CVV/CID', 'Class', 'Amount' (set to '\$0.00'), 'Division ID', 'Action', 'Bill Zip', 'Comment 1', 'Comment 2', 'Auth Code', 'Currency', 'Check Fraud' (checkbox), and 'Order No.'. On the left side of the form are three buttons: 'Credit card', 'Purchase card', and 'Check'. At the bottom right are navigation buttons (back, forward, etc.), a 'Now!' button, and a 'Locked' status indicator. Six numbered steps with arrows point to specific elements: Step 1 points to the 'Active Transactions' tab; Step 2 points to the 'Main' tab; Step 3 points to the 'Credit card' button; Step 4 points to the 'Now!' button; Step 5 points to the 'Account' field; and Step 6 points to the 'Now!' button.

Step 1. Click here.

Step 2. Click here.

Step 3. Choose one.

Step 4. Click here.

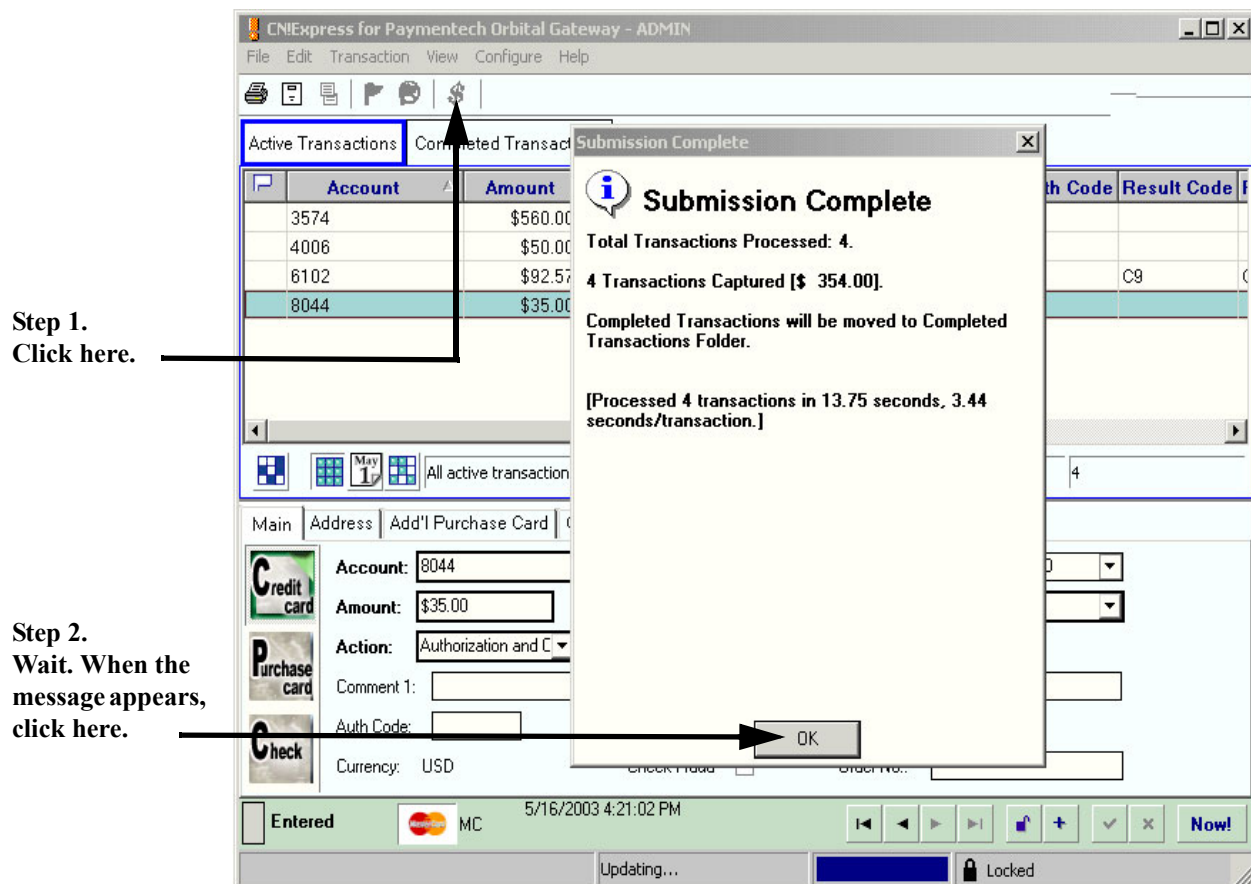
Step 5. Fill out required boxes.

Step 6. Click here.

To move from box to box on the data entry forms, use your mouse or press the **Tab** key on your keyboard. You *must* fill out all boxes that are outlined in **bold**.



Sending Transactions in a Group Using Buttons

You can use the following buttons to submit flagged active transactions a group:



Flagging/Unflagging Transactions Using Buttons

You can't send active transactions to your processing service unless they're flagged. To flag (or unflag) transactions:

1. Select one or more transactions in the Active Transactions table.
2. Do one of the following:
 - Either click on  to flag the transaction(s).
 - Or click on  to remove the flag from the transaction(s).

Printing a Standard Summary Report Using Buttons

To print a standard report using buttons:

Step 1.
Click here.

Step 2.
Choose one.

Step 3.
Click here.
The Print Preview screen appears.

Step 4.
Click on

Step 5.
Click on

Step 6.
Click on

The screenshot shows the 'CNIExpress for Paymentech Orbital Gateway - ADMIN' window. The 'Active Transactions' tab is selected, displaying a table with columns: Account, Amount, Action, Status, Auth Code, and Result Code. A 'Select Report' dialog box is open, listing available reports: 'Records in Current View by Action', 'Records in Current View by Status', 'Records in Current View by Card Type' (selected), 'Records in Current View by Action, Status, and Card Type', 'Flagged Records', and 'Flagged Records with Currency Breakdown'. The 'Description of Selected Report' section states: 'Shows total count and amount for all records in current view (Active or Complete) according to filters set for current view and broken down by Card Type.' The 'Print' button is highlighted. The background interface includes a sidebar with card type filters (Credit card, Purchase card, Check) and a main area with fields for Account (8044), Amount (\$35.00), Action (Authorization and C), Comment 1, Auth Code, Currency (USD), Check Fraud checkbox, and Order No. The status bar at the bottom shows 'Entered', a Mastercard logo, the date/time '5/16/2003 4:21:02 PM', and a 'Locked' status.

Account	Amount	Action	Status	Auth Code	Result Code
3574	\$560.00				
4006	\$50.00				
6102	\$92.57				
8044	\$35.00				

Available Reports:

- Records in Current View by Action
- Records in Current View by Status
- Records in Current View by Card Type
- Records in Current View by Action, Status, and Card Type
- Flagged Records
- Flagged Records with Currency Breakdown

Description of Selected Report:

Shows total count and amount for all records in current view (Active or Complete) according to filters set for current view and broken down by Card Type.

Print Cancel

Entered Mastercard MC 5/16/2003 4:21:02 PM Locked

Creating a Custom Report Using Buttons

The Flagged Records report and the Flagged Records with Currency Breakdown report always show *all* flagged transactions, even if they're not on view. You can't customize those reports by changing the table's layout or filter, only by adding or removing flags.

Most standard summary reports and all table printouts are based on the transactions currently on view. So if you want to change the content of the report or printout, you have to change the transactions that are on view. You need a filter.

If you want a report that only shows transactions over \$100, you need a custom filter. Custom filters let you choose exactly which transactions appear on your screen and on the report or printout.

The steps shown on the next page explain how to use the *CN!Express* standard filter to create and print a standard summary report that includes only today's transactions.

Step 1.
Click here.

Step 2.
Click here.

Step 3.
Choose one.

Step 4.
Click here.
The Print Preview screen appears.

Step 5.
Click on

Step 6.
Click on

Step 7.
Click on

The screenshot shows the 'CNIExpress for Paymentech Orbital Gateway - ADMIN' window. The 'Active Transactions' tab is selected, displaying a table with columns: Account, Amount, Action, Status, Auth Code, and Result Code. A 'Select Report' dialog box is open, showing a list of available reports. The 'Records in Current View by Card Type' report is selected. The dialog also shows a description of the selected report and buttons for 'Print' and 'Cancel'. The 'Print' button is highlighted with a red arrow. The 'Print' button is also highlighted in the main window's toolbar.

Account	Amount	Action	Status	Auth Code	Result Code
3574	\$560.00				
4006	\$50.00				
6102	\$92.50				
8044	\$35.00				

Available Reports:

- Records in Current View by Action
- Records in Current View by Status
- Records in Current View by Card Type
- Records in Current View by Action, Status, and Card Type
- Flagged Records
- Flagged Records with Currency Breakdown

Description of Selected Report:

Shows total count and amount for all records in current view (Active or Complete) according to filters set for current view and broken down by Card Type.

Print Cancel

Chapter 15. Maintenance and Troubleshooting

This chapter describes how to back up and restore the *CN!Express* data base and how to handle possible problems with *CN!Express*.

If you need to contact Auric Systems International, please copy down any error messages you received and keep notes on what happened before and after the trouble started. This information will help us solve your problem quickly.

To contact technical support for *CN!Express*:

Phone:	603-924-6079
E-mail:	support@AuricSystems.com
Web Site:	www.AuricSystems.com

Please have your serial number handy. When you purchased *CN!Express* over the Internet, the serial number and activation key were faxed or e-mailed to you.

You can also find your serial number and activation key under the Help menu:

1. Press **Alt H** (Help menu).
2. Press **A** (About).
3. Scroll down to Serial Number and then Activation Key.
4. Write down the numbers and press **Enter** to leave the Help menu.

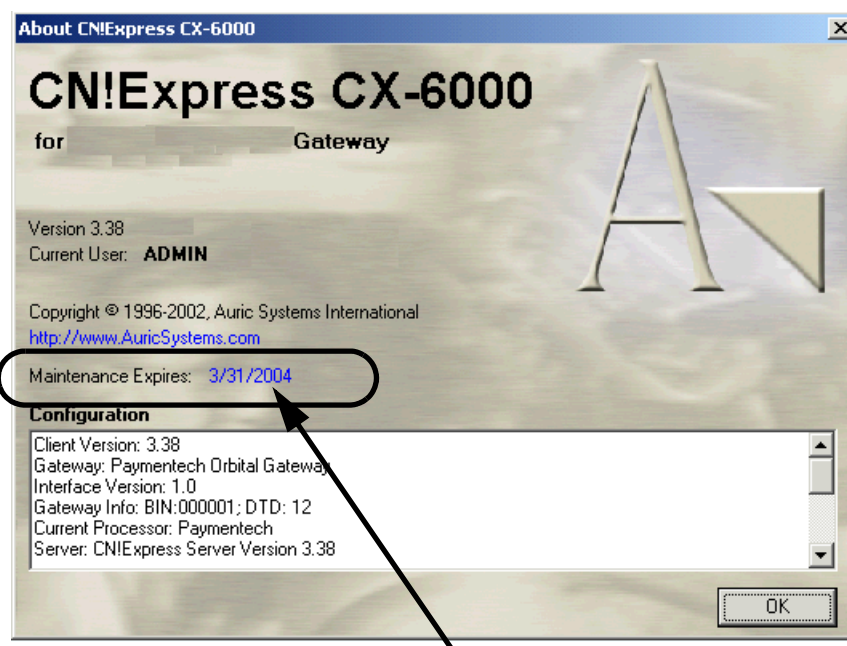
Your problem might involve your specific processing service. For troubleshooting tips for your processing service, refer to the CN!Express web site: www.AuricSystems.com.

Maintenance Contract

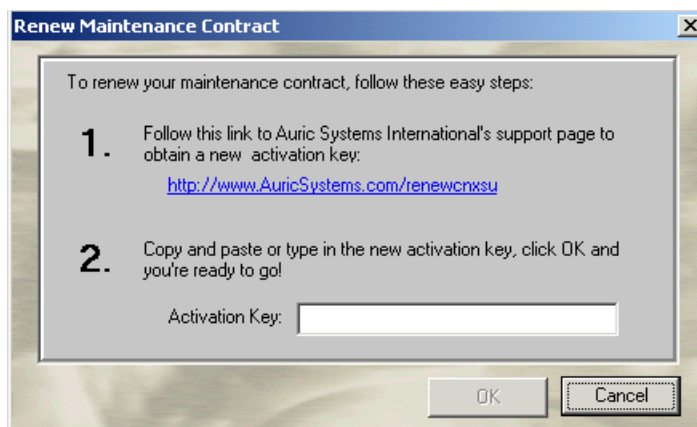
After you switch to the live *CN!Express* (by entering your serial number and activation key), you immediately start your maintenance contract.

To find out about or renew your contract:

1. Press **Alt H** (Help menu).
2. Press **A** (About) to view a screen like the following:



3. To renew your contract, click on the date when your Maintenance Expires, to view:



4. Follow the directions on the screen.

Backup and Restore

You should back up the *CN!Express* data base regularly.

Before you back up or restore, shut down *CN!Express*.

To back up *CN!Express*, copy the DATA directory from your hard drive on to a zip disk or floppy. Look for the Data directory in your program files in the *CN!Express_SU* folder.

If you need to restore the data base, copy the backup files over the existing DATA directory.

Troubleshooting Questions and Answers

I can't log in.

Did you log in under the correct User Name? The CN!Express login screen always shows the User Name of the last user who logged in.

Did you type your password correctly? You must type your password exactly the same way every time you use it, including capital letters. For example, ADMIN, Admin and admin are three different passwords.

If this is the first time you're using CN!Express, type **ADMIN** in the User box and **ADMIN** in the Password box. Once CN!Express starts up, please change the ADMIN password immediately.

I can't remember my password.

An ADMIN user must reset your password. Speak to your manager.

If you're the ADMIN user and you can't remember your password, contact Auric Systems International and ask about our password resetting service.

I can't enter information in the data entry forms.

You may be viewing the Completed Transactions table. You can't enter, change, or delete information if you're viewing completed transactions. Press **Ctrl 2** to view the Active Transactions table.

Do one of the following:

- Either press **Enter** to open a new transaction
- Or double click on a saved transaction to open it for editing

I can't see the transactions I want on the transaction tables.

You may be in a filtered view. Do one of the following:

<i>Press . . .</i>	<i>To View . . .</i>
Alt V , then N	All the transactions in CN!Express
Alt V , then T	Just today's transactions
Alt V , then E	To make sure your filter is set up correctly

If you're using the correct filter, you may need to refresh it. Press **Alt V**, then press **S**.

The transactions you want may have been archived and are no longer available for viewing on CN!Express. See "Archiving Completed Transactions" on page 159.

I can't see some of the fields, data entry forms, and menus mentioned in this manual.

CN!Express hides the fields, forms, and menus that your processing service doesn't use and can't process. For example, you won't see the Line Items tab and data entry form if your processing service doesn't use them. If you're not sure what your processing service expects, see "Appendix C. Processing Service Information" on page 193.

CN!Express hides some menus and screens because they're only available for ADMIN users (for example, the screen for setting up the processing service). To see those menus and screens, you must be logged in as an ADMIN user.

None of my transactions are going to the processing service even though I keep submitting them.

Are you in DEMO mode? If you're in DEMO mode, the word DEMO appears in the upper right hand corner of your screen. Also, the authorization codes for transactions begin with DEM. When you're in DEMO mode, you aren't really saving and sending transactions. You must ask an ADMIN user to turn off DEMO mode.

Is your processing service currently available? You should see a message from CN!Express if it isn't available. Contact your processing service directly for more information.

Are you interacting with your processing service in TEST mode? If you're in TEST mode, the word TEST appears in the upper right hand corner of your screen, and your processing service isn't really processing transactions. You must ask an ADMIN user to turn off TEST mode for your processing service (press **Alt C**, then **O**).

I can't switch users out of DEMO mode, even though there's no check-mark next to Demo/Training on the User Information screen.

You're in the demonstration version of CN!Express. You must enter your serial number and activation key to switch to the live CN!Express. You can then switch users into and out of DEMO mode whenever you like. See "Chapter 4. Going Live and Changing Your Password" on page 31.

Appendix A. Advanced Filtering Techniques

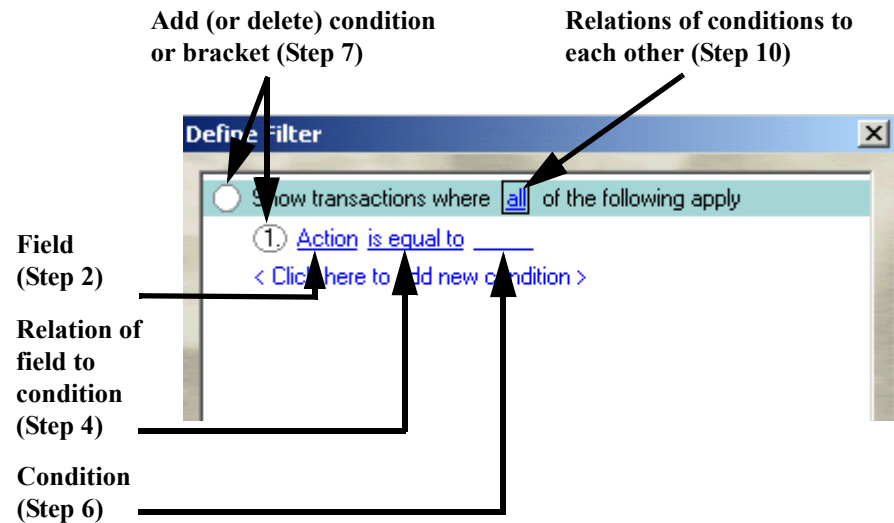
This appendix describes how to create advanced custom filters.

It assumes that you've read "Filtering the Tables" on page 110.

Understanding the Define Filter Screen

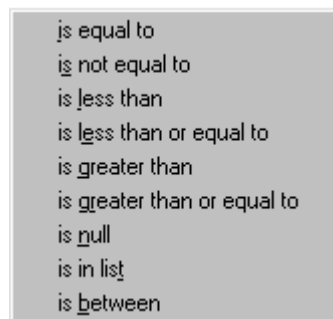
To view the Define Filter screen:

1. Press **Alt V**, then **E** to view:



You can filter on any listed field even though it doesn't currently appear in the tables.

2. Click on Action to view a list of fields.
3. Click on the field you want (for example, Amount).
4. Click on is equal to to view the list of field relations:

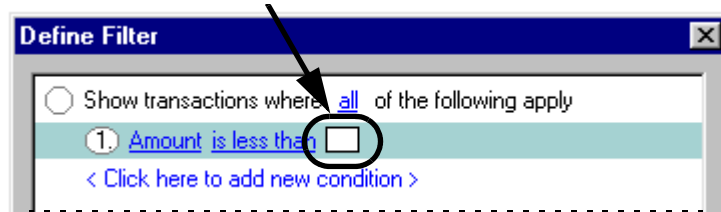


5. Click on the field relation you want.

Some relations may not be valid for some fields. For example, "is in list" is not valid for Created Date or Amount. Also, since Amount is a required field, it can never be "is null" (completely empty).

6. Click on the condition line 

In some cases, the system brings up a menu or calendar. In other cases, a data entry box appears and you must type the condition:

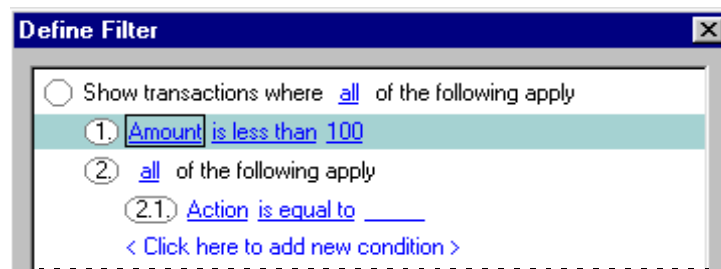


7. Click on  or  to view

Add Condition
Add Bracket
Delete Current Row

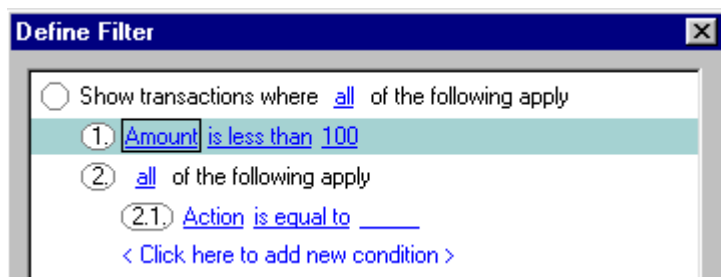
8. Do one of the following:

- Either click on Add Condition to add a new condition line:



For information on filters with two or more conditions, see “A Filter with Two Conditions” on page 181.

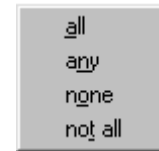
- Or click on Add Bracket to add a bracket:



A bracket contains two or more conditions that act together. For more information, see “A Filter That Uses Brackets” on page 186.

9. Make the changes you want.

10. Click on the condition relation (all) to view:








11. Select the condition relation you want.



12. Click on  to view the filtered table.

You can apply and store just one custom filter at a time. When you press Enter for a new filter, the old one is automatically over-written. If you need the old one again, you'll have to re-create it.

A Filter with Two Conditions

Suppose your Active Transactions table looks something like this:

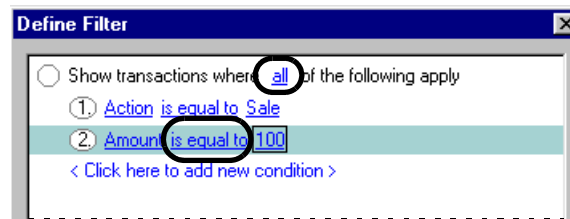
Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Response
	6102	\$50.00	Sale	Entered			
	8044	\$250.00	Sale	Entered			
	5040	\$75.00	Refund/Credit	Entered			
	2624	\$100.00	Sale	Entered			
	3574	\$20.00	Refund/Credit	Entered			

 May 1 

All active transactions.

5

You set up this filter, so that you can view only sales that are equal to \$100:









The following sections describe what happens when you change each of the circled items in the filter.

Working with

<u>a</u> ll
any
none
not all

You're using this table:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Respor
	6102	\$50.00	Sale	Entered			
	8044	\$250.00	Sale	Entered			
	5040	\$75.00	Refund/Credit	Entered			
	2624	\$100.00	Sale	Entered			
	3574	\$20.00	Refund/Credit	Entered			

The filter looks like this:

Define Filter



















☐ Show transactions where all of the following apply

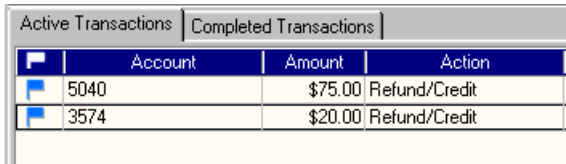
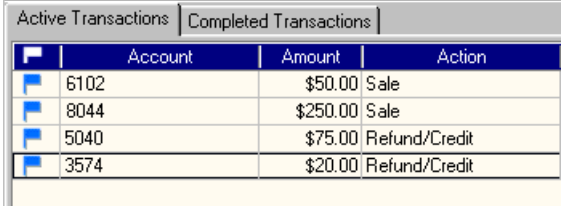
① Action is equal to Sale

② Amount is equal to 100

< Click here to add new condition >

Here's what happens when you click on all and make a choice from the menu:

When You Choose . . .	The System Selects . . .	So You See . . .																				
All	Transactions that meet <i>all</i> conditions: they are SALES and they are also exactly \$100	<table><tr><th colspan="2">Active Transactions</th><th colspan="2">Completed Transactions</th></tr><tr><th></th><th>Account</th><th>Amount</th><th>Action</th></tr><tr><td></td><td>2624</td><td>\$100.00</td><td>Sale</td></tr></table>	Active Transactions		Completed Transactions			Account	Amount	Action		2624	\$100.00	Sale								
Active Transactions		Completed Transactions																				
	Account	Amount	Action																			
	2624	\$100.00	Sale																			
Any	Transactions that meet <i>at least one</i> of the conditions: either they are SALES or they are exactly \$100	<table><tr><th colspan="2">Active Transactions</th><th colspan="2">Completed Transactions</th></tr><tr><th></th><th>Account</th><th>Amount</th><th>Action</th></tr><tr><td></td><td>6102</td><td>\$50.00</td><td>Sale</td></tr><tr><td></td><td>8044</td><td>\$250.00</td><td>Sale</td></tr><tr><td></td><td>2624</td><td>\$100.00</td><td>Sale</td></tr></table>	Active Transactions		Completed Transactions			Account	Amount	Action		6102	\$50.00	Sale		8044	\$250.00	Sale		2624	\$100.00	Sale
Active Transactions		Completed Transactions																				
	Account	Amount	Action																			
	6102	\$50.00	Sale																			
	8044	\$250.00	Sale																			
	2624	\$100.00	Sale																			

<i>When You Choose . . .</i>	<i>The System Selects . . .</i>	<i>So You See . . .</i>															
None	Transactions that meet <i>none</i> of the conditions: they aren't SALES and they also aren't exactly \$100	 <table border="1"> <thead> <tr> <th>Account</th> <th>Amount</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>5040</td> <td>\$75.00</td> <td>Refund/Credit</td> </tr> <tr> <td>3574</td> <td>\$20.00</td> <td>Refund/Credit</td> </tr> </tbody> </table>	Account	Amount	Action	5040	\$75.00	Refund/Credit	3574	\$20.00	Refund/Credit						
Account	Amount	Action															
5040	\$75.00	Refund/Credit															
3574	\$20.00	Refund/Credit															
Not all	Transactions do <i>not</i> meet <i>at least one</i> of the conditions: either they aren't SALES or they aren't exactly \$100	 <table border="1"> <thead> <tr> <th>Account</th> <th>Amount</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>6102</td> <td>\$50.00</td> <td>Sale</td> </tr> <tr> <td>8044</td> <td>\$250.00</td> <td>Sale</td> </tr> <tr> <td>5040</td> <td>\$75.00</td> <td>Refund/Credit</td> </tr> <tr> <td>3574</td> <td>\$20.00</td> <td>Refund/Credit</td> </tr> </tbody> </table>	Account	Amount	Action	6102	\$50.00	Sale	8044	\$250.00	Sale	5040	\$75.00	Refund/Credit	3574	\$20.00	Refund/Credit
Account	Amount	Action															
6102	\$50.00	Sale															
8044	\$250.00	Sale															
5040	\$75.00	Refund/Credit															
3574	\$20.00	Refund/Credit															

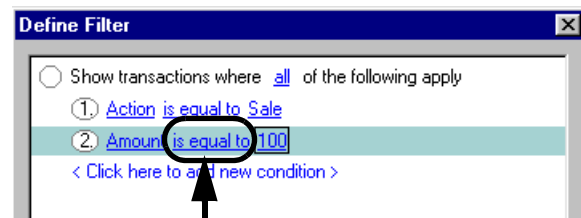
Working with

is equal to
 is not equal to
 is less than
 is less than or equal to
 is greater than
 is greater than or equal to
 is null
 is in list
 is between

You're using this table:

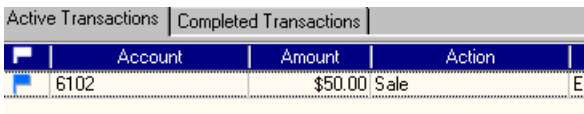
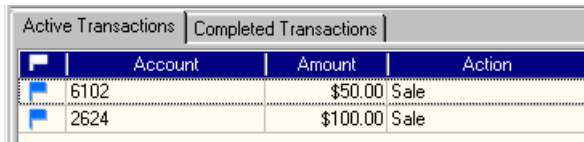
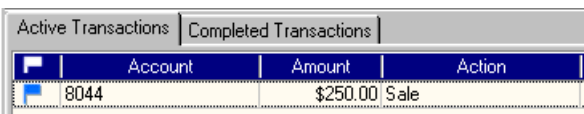
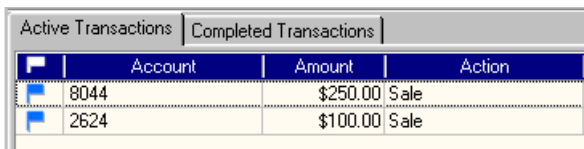
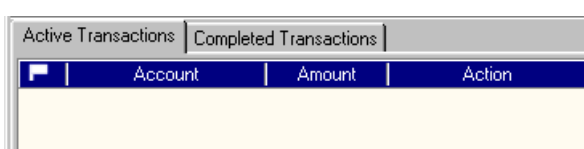
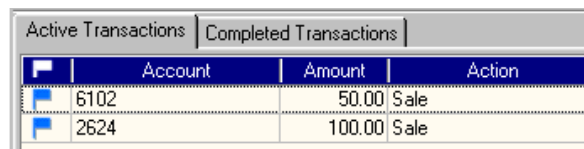
Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Respor
	6102	\$50.00	Sale	Entered			
	8044	\$250.00	Sale	Entered			
	5040	\$75.00	Refund/Credit	Entered			
	2624	\$100.00	Sale	Entered			
	3574	\$20.00	Refund/Credit	Entered			

The filter looks like this:









Here's what happens if you click on is equal to and make a choice from the menu:


<i>When You Choose . . .</i>	<i>The System Selects . . .</i>	<i>So You See . . .</i>
is equal to	Transactions that are SALES and are <i>exactly</i> \$100 (not less and not more)	
is not equal to	Transactions that are SALES and are <i>not exactly</i> \$100	

<i>When You Choose . . .</i>	<i>The System Selects . . .</i>	<i>So You See . . .</i>
is less than	Transactions that are SALES and are <i>less</i> than \$100 (does not include transactions that are exactly \$100)	
is less than or equal to	Transactions that are SALES and are <i>either less</i> than \$100 <i>or exactly</i> \$100	
is greater than	Transactions that are SALES and are <i>greater</i> than \$100 (does not include transactions that are exactly \$100)	
is greater than or equal to	Transactions that SALES and are <i>either greater</i> than <i>or exactly</i> \$100	
is null	Transactions that are SALES and do <i>not</i> have an amount filled in	
is in list	Transactions that are SALES and are <i>check-marked</i> on the list. (A list of choices appears. Click on one or more choices.)	This choice is used with items such as Action or Card Type. It isn't valid with Amount.
is between	Transactions that are SALES and are <i>at least</i> \$XX <i>and no more than</i> \$XX (for this example, between \$50 and \$100)	

A Filter That Uses Brackets

Here's your starting screen:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	Response
	6102	\$50.00	Sale	Entered			
	8044	\$250.00	Sale	Entered			
	5040	\$75.00	Refund/Credit	Entered			
	2624	\$100.00	Sale	Entered			
	3574	\$20.00	Refund/Credit	Entered			



All active transactions.

5

Suppose you want to view two types of transactions:

- Credits (refunds) that are greater than \$50
- Sales in any amount

The following filter wouldn't work. There aren't any transactions that are *both* credits *and* sales.

Define Filter

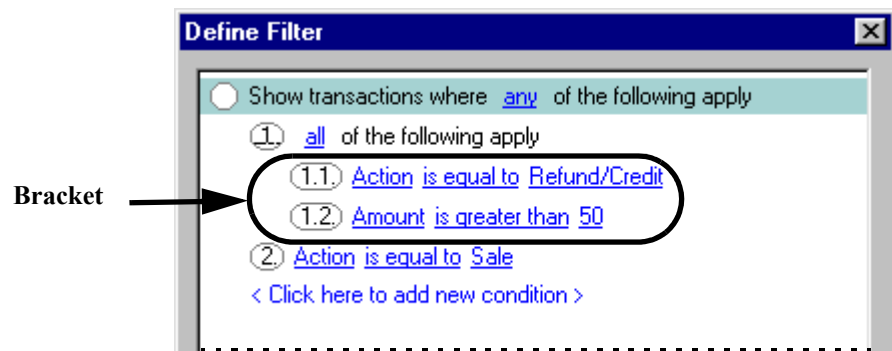
☐ Show transactions where all of the following apply

① [Action is equal to Refund/Credit](#)
 ② [Amount is greater than 50](#)
 ③ [Action is equal to Sale](#)
[< Click here to add new condition >](#)

If you change all to any, you'll see all credits, all sales, and any transactions (even voids and authorizations) where the amount is greater than \$50. No matter how you change the filter, it won't work.

To see exactly what you want to see, you have to use a bracket.

Set up this filter:



This filter tells CN!Express that you're looking for transactions that are *either* credits greater than \$50 *or* sales in any amount.

You'll see:

Active Transactions		Completed Transactions					
	Account	Amount	Action	Status	Auth Code	Result Code	
6102		\$50.00	Sale	Entered			0
8044		\$250.00	Sale	Entered			0
5040		\$75.00	Refund/Credit	Entered			0
2624		\$100.00	Sale	Entered			0

A Filter That Uses Nested Brackets

You can create complex filters by nesting brackets: setting up brackets and sub-brackets.

Suppose you want to trace a duplicate transaction and find out if a credit was issued in the correct amount. You know that a Master Card was used, that both sales and credit were completed on the same day (11/20/01), and that both sales were for \$50. But you're not sure how much the credit was for. Here's the screen you start with:

Active Transactions		Completed Transactions				
	Account	Amount	Action	Status	Auth Code	Result Code
	6102	\$50.00	Sale	Deposited	DEM056	0 1
	8044	\$250.00	Sale	Deposited	DEM007	0 1
	5040	\$75.00	Refund/Credit	Refunded		0 1
	2624	\$100.00	Sale	Deposited	DEM096	0 1
	3574	\$20.00	Refund/Credit	Refunded		0 1
	6102	\$50.00	Refund/Credit	Refunded		0 1
	1007	\$120.00	Refund/Credit	Refunded		0 1
	1011	\$50.00	Sale	Deposited	DEM055	0 1
	6102	\$75.00	Sale	Deposited	DEM051	0 1
	5150	\$50.00	Sale	Deposited	DEM050	0 1

May 12 All completed transactions. 11

You set up this filter:

Define Filter

☐ Show transactions where all of the following apply

- ① Card Type is equal to MC
- ② Created Date is equal to 11/20/01
- ③ any of the following apply
 - ③.1. Action is equal to Refund/Credit
 - ③.2. all of the following apply
 - ③.2.1. Action is equal to Sale
 - ③.2.2. Amount is equal to 50

[< Click here to add new condition >](#)

To create the nest brackets at 3.2.1 and 3.2.2, click on ③.2

This filter tells CN!Express you are looking for transactions that used Master Card *and* were created on 11/20/01 *and* are *either* credits in any amount *or* sales in the amount of \$50.

You'll see:

Active Transactions		Completed Transactions					
	Account	Amount	Δ	Action	Status	Auth Code	Result Code
	3574	\$20.00		Refund/Credit	Refunded		0 11/2
	6102	\$50.00		Refund/Credit	Refunded		0 11/2
	6102	\$50.00		Sale	Deposited	DEM038	0 11/2
	6102	\$50.00		Sale	Deposited	DEM056	0 11/2

Note that only Master Cards are listed even though Card Type isn't shown on the Completed Transactions table. The field you are filtering on doesn't have to be a column in the table.

Appendix B.

Client/ Server

When you start up *CN!Express*, two programs start, not just one. The first program, the one where you manage transactions, is the *CN!Express* client. The other program is the *CN!Express* server. The server contains the *CN!Express* data base and business logic. When you work in *CN!Express*, both client and server must be running.

The server starts automatically when you click on



The server shuts down automatically when you shut down *CN!Express*.

You should never shut the server down separately when *CN!Express* is running.

Because of this client/server arrangement:

- You must have TCP/IP on when you're submitting transactions to the processing service.
- You can easily upgrade to a multi-user version of *CN!Express* in the future, if you desire.

Appendix C.

Processing

Service

Information

This appendix contains specific information on the various checking, credit card, and purchase card processing services.

If your processing service supports a particular feature of *CN!Express*, the fields and menus related to that feature appear on your screen. For example, if your processing service supports multiple currencies, the Currency box appears on the Main data entry form, and the ADMIN user can select from a list of currencies under System Settings. But if your processing service doesn't support multiple currencies, neither the Currency box nor the list of currencies appears.

Specifications, supported features, and system requirements are continually changing. *CN!Express* changes to keep pace. You can always find the latest information at www.AuricSystems.com.

Paymentech Orbital Gateway

Setting Up the Paymentech Orbital Gateway Processing Service

When you configure the processing service setup (press **Alt C**, then **O**), you view a screen like the following:

Click on each tab provided (Settings, Merchant IDs [also known as Division Numbers], URL/Proxy) and fill in the following information:

<i>Field</i>	<i>Fill Out by Typing . . .</i>
Bin	000001 for Salem or 000002 for PNS or as assigned by Paymentech
Terminal ID	001 or as assigned by Paymentech
Time Zone	Your time zone (for example, Eastern or Pacific)

<i>Field</i>	<i>Fill Out by Typing . . .</i>
Installation ID	Enter a number (of your own choosing) for the CN!Express installed on this computer. If CN!Express is installed on more than one computer in your company, you must enter a unique installation number for each one. (Paymentech uses this number to help create a unique identification for each transaction, for more precise detection of duplicates.)
Send "Comment 1" Field to Gateway	Check-mark the box if you want your processing service to automatically receive the information you placed in the comment 1 field (on the Main data entry form and/or the Comments data entry form).
Merchant ID (called Division ID if Bin is 000001)	ID assigned by Paymentech; you can add a description, but only the assigned number is processed (Tampa Merchant ID is 12 characters long and Salem Division Number is 6 characters long)
Host URL	URL assigned by Paymentech
Use HTTPS proxy server	Check-mark the box if you're connecting to the Paymentech HTTPS gateway through a proxy server
Address	Address of the proxy server, if you're using one
Port	Port for the proxy server, if you're using one

Changing the Server Connection

You can change the default Server Connection information, if necessary (under the URL/Proxy tab). If CN!Express can't immediately connect to your processing service, this information determines whether and for how long CN!Express keeps trying to connect.

<i>Option</i>	<i>With a Check-Mark . . .</i>	<i>Without a Check-Mark . . .</i>
Timeout if No Response In:	<input checked="" type="checkbox"/> CN!Express waits for the processing service to respond during the amount of time shown in the Minutes:Seconds box. If there's no response at the end of that time, CN!Express gives up.	<input type="checkbox"/> If CN!Express keeps waiting for the processing service to respond; CN!Express gives up waiting only when it's paused or shut down.

The default (and minimum time) shown in the Minutes:Seconds box is 1 minute, 10 seconds. The maximum time is 59 minutes, 59 seconds. Within those limits, you can enter any length of time you prefer.

How Paymentech Orbital Gateway Supports CN!*Express* Features

<i>Feature</i>	<i>Paymentech Orbital Gateway . . .</i>
Check processing	Supports
Class	Supports; you can select default class settings for imports (using the import screens) and for users (using the Configure Users screen)
Close batch	Supports
Comment fields	Supports, but only processes one comment field (Comment 1)
Fraud detection	Supports; you can select fraud detection for each transaction; fraud information appears in the overall error codes
Multiple currencies	Supports, but only for Paymentech Salem
Multiple merchant IDs	Supports as a CN! <i>Express</i> option
Partial voids	Supports
Purchase Card Level II	Supports; Purchase Card Level III is not supported on the Paymentech Orbital Gateway side
Split captures	Supports

Appendix D.

Keyboard

Shortcuts

This chapter describes how to use your keyboard to perform most actions and view most screens in *CN!Express*.

The following tables are organized by the type of key:

<i>Type of Keys</i>	<i>Press . . .</i>	<i>To Do This . . .</i>
Function Keys	F1	View Help (CN!Express Manual)
	F2	View Main data entry form
	F3	View Address data entry form
	F4	View Add'l Purchase Card data entry form
	F5	View Line Items data entry form (if available)
	F6	View Comments data entry form
	F7	View Responses data entry form
Alt Keys (Press both the Alt key and the letter key at the same time)	Alt F	View File menu
	Alt E	View Edit menu
	Alt T	View Transaction menu
	Alt V	View View menu
	Alt C	View Configure menu
	Alt H	View Help menu
	Alt F4	Exit CN!Express
Ctrl Keys (Press both the Ctrl key and the letter (or number) key at the same time)	Ctrl A	Select all (in a field box)
	Ctrl C	Copy
	Ctrl F	Toggle flags for selected transactions
	Ctrl P	Print table you're viewing
	Ctrl R	Print standard report
	Ctrl I	Submit one transaction NOW!
	Ctrl V	Paste
	Ctrl X	Cut
	Ctrl 2	View Active Transactions table
	Ctrl 3	View Completed Transactions table
Other Keys	Enter	Save transaction, and open a new data entry form for the next transaction
	Tab	Move to the next box in the data entry form
	Ctrl Tab	Move to next data entry form

After a menu appears, you can choose an item on the menu by pressing a key on your keyboard. Look for the underlined letter in the item's name and press that key. For example, press **Alt F**, then **T** to Exit (shut down) CN!Express.

To leave a menu without making a selection, press Esc, not Enter.

Instead of pressing Enter,







you can click on








The following table is organized alphabetically by type of task. Your processing service may not support some of these tasks.

<i>Type of Task</i>	<i>To Do This . . .</i>	<i>Press These Keys . . .</i>	<i>Or Click on This Icon . . .</i>
Archive	Archive Completed Records	Alt F , then A	
Batches	View Batch History	Alt T , then B	
	Close Batch	Alt T , then O	
Data Entry Form	View Add'l Purchase Card Data Entry Form	F4	
	View Address Data Entry Form	F3	
	View Comments Data Entry Form	F6	
	View Line Items Data Entry Form	F5	
	View Main Data Entry Form	F2	
	View Responses Data Entry Form	F7	
Edit	Copy	Ctrl C	
	Cut	Ctrl X	
	Paste	Ctrl V	
	Select All (in box)	Ctrl A	
	Edit Transaction	Alt T , then E	
Exit CN!Express	Exit (shutdown)	Alt F , then T	
Export	Begin Quick Export	Alt F , then E	
	Begin Wizard	Alt F , then X	

<i>Type of Task</i>	<i>To Do This . . .</i>	<i>Press These Keys . . .</i>	<i>Or Click on This Icon . . .</i>
Filter	Apply Filter to All Active and Completed (toggle)	Alt V , then L	
	Apply Filtered View	Alt V , then F	
	Refresh Filtered View	Alt V , then S	
	Set Filter (define a custom filter)	Alt V , then E	
	View All Transactions	Alt V , then N	
	View Today's Transactions	Alt V , then T	
Flag	Flag All Transactions (whether or not in view)	Alt T , then L , then A	
	Flag All Transactions in View	Alt T , then L , then V	
	Flag Authorized	Alt T , then L , then Z	
	Flag Selected Transactions	Alt T , then L , then F	
	Toggle Flags on Selected Transactions	Ctrl F	
	Unflag All Transactions (whether or not in view)	Alt T , then L , then L	
	Unflag All Transactions in View	Alt T , then L , then I	
	Unflag Selected Transactions	Alt T , then L , then U	
	View Flag Menu	Alt T , then L	
Fraud Detection	Request Fraud Detection	Alt T , then U	
Help	View CN!Express Manual	F1	
	View Field Reference	Alt H , then F	
	View Quick Reference Guide	Alt H , then Q	
	View System Information	Alt H , then A	
	View Auric Systems International Home Page	Alt H , then H	

<i>Type of Task</i>	<i>To Do This . . .</i>	<i>Press These Keys . . .</i>	<i>Or Click on This Icon . . .</i>
Import	Import	Alt F , then I	
Print	Change Print Setup	Alt F , then S	
	Print Receipt	Alt T , then P	
	Print Report	Ctrl R	
	Print Table	Ctrl P	
Processing Service Setup	Configure Processor Setup	Alt C , then O	
Receipt	Configure Receipt Settings (change content of receipt)	Alt C , then R	
	Print Receipt	Alt T , then P	
Report	Change Print Setup (change orientation of report)	Alt F , then S	
	Print Report	Ctrl R	
Submit	Submit All Flagged Transactions	Alt T , then F	
	Submit One Transaction Immediately (NOW!)	Ctrl I (or Alt T , then T)	
System	Configure System Setup (for authorizations, currencies, countries)	Alt C , then Y	
	Exit CN!Express (shut down)	Alt F , then T	

<i>Type of Task</i>	<i>To Do This . . .</i>	<i>Press These Keys . . .</i>	<i>Or Click on This Icon . . .</i>
Table	Apply Table Layout to Active and Completed (toggle)	Alt V , then Y	
	Auto-Fit Columns	Alt V , then U	
	Change Table Layout	Alt C , then L	
	Print Table	Ctrl P	
	Change Print Setup (change orientation of printout)	Alt F , then S	
	View Active Transactions Table	Ctrl 2	
	View Completed Transactions Table	Ctrl 3	
Transaction	Cancel Changes	Alt T , then H	
	Close Transaction	Alt T , then C	
	Delete	Alt T , then D	
	Edit	Alt T , then E	
	Open New Transaction (also saves previous transaction)	Enter	
	Refund/Credit	Alt T , then R	
	Save Transaction (without opening new transaction)	Alt T , then S	
	Split Capture	Alt T , then I	
	Submit All Flagged Transactions	Alt T , then F	
	Submit One Transaction Immediately (NOW!)	Ctrl I	
User	Void/Partial Void	Alt T , then V	
	Set Password	Alt C , then S	
	Set User Settings	Alt C , then U	
	View CN!Express Manual	F1	
	View Quick Reference Guide	Alt H , then Q	

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